

Candidate Logbook

SVQ

SVQ1 in Retail Skills at SCQF Level 4

December 2011



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Authorised by Martin Stretton
Prepared by Beverley Anim-Antwi

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Section 1: SVQ1 in Retail Skills at SCQF Level 4

Introduction

This document contains information specific to the SVQ1 in Retail Skills at SCQF Level 4.

National Occupational Standards and SVQs

The standards, Assessment Strategy and qualification structures for the SVQ1 in Retail Skills at SCQF Level 4 are owned by Skillsmart Retail, who reviewed these National Occupational Standards. The SVQs have been developed from the National Occupational Standards.

The SVQ1 in Retail Skills at SCQF Level 4 gives recognition of candidates' skills, knowledge and understanding. It allows candidates to gain a qualification in the workplace that relates to their job and promotes good working practice.

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

Skillsmart Retail Limited
4th Floor
93 Newman Street
London, W1T 3EZ

Telephone: 020 7462 5060
Fax: 020 7462 5061
Email: contactus@skillsmartretail.com
Website: www.skillsmartretail.com

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

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

Which SVQs in Retail Skills/Retail are available?

The SVQs in Retail Skills/Retail are available as follows:

SVQ1 in Retail Skills at SCQF Level 4

SVQ2 in Retail Skills at SCQF Level 5

SVQ3 in Retail (Sales Professional) at SCQF Level 6

SVQ3 in Retail (Visual Merchandising) at SCQF Level 6

SVQ3 in Retail (Management) at SCQF Level 6

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

Who is this SVQ for?

The SVQ1 in Retail Skills at SCQF Level 4

The Edexcel SVQ1 in Retail Skills at SCQF Level 4 is based on the National Occupational Standards (NOS) developed by Skillsmart Retail and is intended for individuals who work in the retail sector. These individuals may be working as:

- retail sales people
- retail assistants
- counter assistants
- stockroom/warehouse assistants
- visual merchandisers
- cash point operators.

What progression opportunity does this SVQ offer me?

Candidates may progress within their own employment or they can also progress to:

- the SVQ2 in Retail Skills at SCQF Level 5
- other Level 1 qualifications, such as the Edexcel BTEC Level 1 Award and Certificate in Retail Knowledge (QCF)
- the Edexcel BTEC Level 2 Award, Certificate and Diploma in Retail Knowledge (QCF)
- the Edexcel BTEC Level 2 Certificate in Retail Knowledge (Beauty) (QCF)
- the Edexcel BTEC Level 3 Award, Certificate and Diploma in Retail Knowledge (QCF).

What is the structure of the SVQ1 in Retail Skills at SCQF Level 4?

To achieve the whole qualification at Level 4, you must prove competence in **five** units.

This comprises:

- **one** mandatory unit
- **three** units from any of the Groups A, B, C, D and E
- **one** further unit from either Group A, B, C, D, E or F.

Mandatory unit for the SVQ1 in Retail Skills at SCQF Level 4

You must achieve the unit listed below:

Unit number	Unit code	Title	Unit credit	SCQF level
1	E.03	Work effectively in your retail team	7	4

Optional units for the SVQ1 in Retail Skills at SCQF Level 4

You must achieve:

- **three** units from any of the Groups A, B, C, D and E
- **one** further unit from either Group A, B, C, D, E or F.

Group A - Stock management

Unit number	Unit code	Title	Unit credit	SCQF level
2	B.01	Move goods and materials manually in a retail environment	3	4
3	B.08	Process donated goods for resale or recycling in a retail environment	6	4
4	B.29	Load orders for despatch from a retail store to customers	3	4

Group B - Product expertise (Food and drink)

Unit number	Unit code	Title	Unit credit	SCQF level
5	B.20	Contribute to food safety in a retail environment	7	4
6	C.58	Provide a counter/takeaway service	3	4

Group C - Merchandising

Unit number	Unit code	Title	Unit credit	SCQF level
7	B.02	Keep stock at required levels in a retail environment	3	4
8	C.51	Contribute to monitoring and maintaining ease of shopping in a retail sales area	2	4

Group D - Customer service

Unit number	Unit code	Title	Unit credit	SCQF level
9	C.01	Wrap and pack goods for customers in a retail environment	3	4

Group E - Organisational effectiveness

Unit number	Unit code	Title	Unit credit	SCQF level
10	E.01	Help to keep the retail unit secure	4	4
11	E.02	Help to maintain health and safety in a retail environment	5	4
12	E.04	Keep the retail environment clean and hygienic (non-food)	3	4

Group F - Optional SCQF Level 5 units

Unit number	Unit code	Title	Unit credit	SCQF level
13	B.03	Receive goods and materials into storage in a retail environment	4	5
14	B.04	Put goods and materials into storage in a retail environment	4	5
15	B.05	Keep stock on sale at required levels in a retail environment	3	5
16	B.06	Process customer orders for goods in a retail environment	3	5
17	B.07	Process returned goods and materials in a retail environment	3	5
18	B.09	Prepare products for sale to customers in a retail environment	3	5
19	B.10	Process bake-off products for sale in a retail environment	6	5

Unit number	Unit code	Title	Unit credit	SCQF level
20	B.12	Process greengrocery products for sale in a retail environment	9	5
21	B.13	Finish meat products by hand in a retail environment	9	5
22	B.21	Maintain food safety while working with food in a retail environment	8	5
23	B.23	Receive driver-controlled deliveries of fuel on a petrol forecourt	7	5
24	B.24	Control deliveries of motor fuel in a forecourt	7	5
25	B.28	Pick products in a retail store to fulfil customer orders	4	5
26	B.30	Check stock levels and sort out problems with stock levels in a retail store	2	5
27	B.31	Hand-process fish in a retail environment	8	5
28	B.32	Contribute to the control and efficiency of dough production in a retail environment	4	5
29	B.33	Select, weigh and measure bakery ingredients	6	5
30	B.34	Hand divide, mould and shape fermented doughs	6	5
31	C.02	Display stock to promote sales to customers in a retail environment	6	5
32	C.03	Help customers choose products in a retail environment	8	5
33	C.04	Maximise product sales in a retail environment	5	5
34	C.05	Provide information and advice to customers in a retail environment	5	5
35	C.06	Demonstrate products to customers in a retail environment	3	5
36	C.08	Process payments for purchases in a retail environment	5	5
37	C.09	Process payments and credit applications for purchases in a retail environment	7	5
38	C.10	Process cash and credit transactions in a retail environment	7	5
39	C.11	Assemble retail products in customer's home/workplace	4	5

Unit number	Unit code	Title	Unit credit	SCQF level
40	C.12	Promote loyalty schemes to customers in a retail environment	5	5
41	C.17	Provide the lingerie fitting service in a retail environment	8	5
42	C.18	Follow guidelines for planning and preparing visual merchandising displays	7	5
43	C.19	Follow guidelines for dressing visual merchandising displays	8	5
44	C.20	Order graphic materials for visual merchandising displays	3	5
45	C.21	Dismantle and store visual merchandising displays	13	5
46	C.22	Make props for visual merchandising displays	10	5
47	C.23	Put visual merchandising displays together	8	5
48	C.35	Promote beauty products to retail customers	10	5
49	C.36	Follow point-of-sale procedures for age-restricted products in a retail environment	8	5
50	C.37	Help customers to buy National Lottery products in a retail environment	8	5
51	C.39	Process the self-service dispensing and purchase of motor fuel on a forecourt	7	5
52	C.40	Establish customer needs and provide advice regarding tiling products	6	5
53	C.41	Advise customers upon measuring and planning for the fixing of tiles	6	5
54	C.42	Advise customers upon the fixing of tiles	6	5
55	C.43	Maintain a display of cut flowers in a retail store	3	5
56	C.46	Cash up in a retail store	2	5
57	C.47	Promote the store's credit card to customers	3	5
58	C.48	Provide service to customers in the dressing room of a retail store	1	5
59	C.49	Promote sales of food or drink products by offering samples to customers	2	5
60	C.50	Deliver retail products to the customer's premises	3	5

Unit number	Unit code	Title	Unit credit	SCQF level
61	C.52	Help customers to apply for the store's credit card and associated insurance products	4	5
62	C.54	Help customers to choose delicatessen products in a retail outlet	6	5
63	C.55	Portion delicatessen products in a retail outlet to meet individual customers' requirements	6	5
64	D.10	Give customers a positive impression of yourself and your organisation	5	5
65	D.11	Support customer service improvements	5	5
66	D.12	Resolve customer service problems	6	5
67	E.06	Help to maintain health and safety in a retail environment	4	5
68	E.07	Help to keep the retail unit secure	6	5
69	E.16	Allocate and check work in your team	12	5
70	E.20	Prepare newspapers and magazines for return to the merchandiser	2	5
71	E.22	Check the accuracy of records of hours worked in a retail store	3	5

Section 2: Examples of forms

Collecting your evidence

This section contains examples of the forms you, your assessor and the internal verifier will use while you are undertaking your SVQ1 in Retail Skills at SCQF Level 4.

The forms are:

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

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

Example form 1 – Portfolio title page

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

Example form 2 – Personal profile

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

continued overleaf...

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

Example form 3 – Contents checklist

SVQ title:		
Candidate:		
	Completed?	Page/section number
Title page for the portfolio		
Personal profile <ul style="list-style-type: none"> • your own personal details • a brief CV or career profile • description of your job • information about your employer/training provider/college 		
Summary of the units		
Completed units <ul style="list-style-type: none"> • signed by yourself, your assessor and the internal verifier (where relevant) • reference numbers included • unit assessment plans 		
Unit progress records		
Index of evidence (with cross-referencing information completed)		
Evidence (with reference numbers) <ul style="list-style-type: none"> • observation records • details of witnesses (witness testimony sheets) • personal statements 		

Example form 5 – Unit assessment plan

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

Example form 7 – Work Log

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

Example form 8 – Observation record

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

Example form 9 – Witness testimony

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

Example form 10 – Expert witness evidence record

SVQ title and level:	
Candidate name:	
Evidence index number:	
Where applicable, evidence number to which this testimony relates:	
Unit:	
Element(s):	
Date of evidence:	
Expert witness name:	
Relationship to candidate:	
Details of testimony:	
I can confirm the candidate's evidence is authentic and accurate.	
Expert witness signature:	
Name:	Date:
Contact telephone number:	
<i>Please tick (✓) the appropriate box.</i>	
<input type="checkbox"/>	QUALIFIED AS AN ASSESSOR FOR WORKPLACE PERFORMANCE
<input type="checkbox"/>	RELEVANT PROFESSIONAL WORK ROLE THAT INVOLVES EVALUATING EVERYDAY STAFF PRACTICE
<input type="checkbox"/>	CURRENT EXPERTISE
<input type="checkbox"/>	FAMILIAR WITH THE SVQ STANDARDS TO WHICH THE CANDIDATE IS WORKING

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

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

Section 3: Logbook

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Mandatory units

Unit 1:	Work effectively in your retail team
Unit code:	E.03
Unit credit:	7
Unit level:	4

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Work well as part of a retail team - you need to know and understand:</p> <p>K1.1 how to keep track of how much work you have to do and how long it is likely to take</p> <p>K1.2 why you should ask for help and information from colleagues when you need it</p> <p>K1.3 why you should offer help to colleagues and respond positively to requests for help, whenever possible</p> <p>K1.4 how the law and your organisation define discrimination, bullying and harassment</p> <p>K1.5 company procedures for dealing with discrimination, bullying and harassment</p> <p>K1.6 why you must always follow instructions for safeguarding health and safety as you work</p> <p>2. Follow plans and procedures for learning in a retail environment team - you need to know and understand:</p>		
<p>K2.1 why you need to be an effective learner at work</p> <p>K2.2 which people are responsible for setting your targets and helping you learn</p> <p>K2.3 why you need to plan your learning and why you need action points and deadlines in your training programme</p> <p>K2.4 company procedures for following training programmes</p> <p>K2.5 why you should ask for help with any problems you have with your training, and who to ask</p>		

Additional evidence (if applicable):

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	O = DIRECT OBSERVATION OF THE LEARNER'S PERFORMANCE BY THEIR ASSESSOR	PD = PROFESSIONAL DISCUSSION
COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
	P = PRODUCTS OF THE LEARNER'S WORK	WT = AUTHENTIC STATEMENTS/WITNESS TESTIMONY
	RA = PERSONAL STATEMENTS AND/OR REFLECTIVE ACCOUNTS	EPW = EXPERT WITNESS TESTIMONY
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Element 1: Work well as part of a retail team

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 ask colleagues promptly and politely for the help and information you need to do your work						
P1.2 respond willingly and promptly to colleagues' requests for help and information when your workload allows and without taking on more responsibility than you are authorised to do						
P1.3 ask a suitable person for advice about any problems that you cannot solve yourself in working with colleagues						
P1.4 follow instructions for safeguarding health and safety as you work						

Additional evidence (if applicable):

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Element 2: Follow plans and procedures for learning in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 check that you are clear about what you need to learn and when you need to learn it by						
P2.2 check that you are clear about how you will learn, including the specific action points in your training programme						
P2.3 promptly ask the right people for help when you are having problems following your training programme						

Additional evidence (if applicable):

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Optional units

Unit 2: **Move goods and materials manually in a retail environment**

Unit code: B.01

Unit credit: 3

Unit level: 4

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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

Element 1: Move goods and materials manually in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 check where items are to be stored						
P1.2 check what time you need to complete the task by						
P1.3 check that the equipment you need is available and in working order						
P1.4 identify any faults with the equipment and report these to the right person						
P1.5 use safe and approved techniques for handling items						
P1.6 recognise when you need help in moving items and ask the right people promptly						
P1.7 put items in the correct places						
P1.8 place items so that they can be identified and reached easily						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.9 move and place items within the time allowed						
P1.10 ask the right person for advice if you are having trouble placing items correctly						

Additional evidence (if applicable):

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	<p>Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING</p>	<p>A = ASSIGNMENT, PROJECT/CASE STUDIES</p>
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Unit 3: **Process donated goods for resale or recycling in a retail environment**

Unit code: B.08

Unit credit: 6

Unit level: 4

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Process donated goods in a retail environment for selling or recycling - you need to know and understand:</p> <p>K1.1 the types of goods the store sells</p> <p>K1.2 the types of goods that can be sent for recycling</p> <p>K1.3 which types of goods are not suitable for selling or recycling and how to get rid of them</p> <p>K1.4 the legal and company safety requirements which apply to second-hand goods, including electrical equipment, furniture and toys</p> <p>K1.5 the legal age restrictions which apply to videos, DVDs and computer games</p> <p>K1.6 where to store donated goods until you are ready to sort them</p> <p>K1.7 where and when to sort donated goods</p> <p>K1.8 why you should tidy and clean the sorting area before starting to sort goods</p> <p>K1.9 where to put goods as you sort them</p> <p>K1.10 who to ask for help in identifying unusual items or deciding what to do with them</p> <p>K1.11 the procedures to follow to prepare goods for recycling</p> <p>K1.12 where to put goods for recycling so that they can be collected</p> <p>K1.13 how to identify goods that need to be cleaned, tidied or repaired</p> <p>K1.14 how to clean, tidy and repair different types of goods</p> <p>K1.15 how to use irons and steamers safely and effectively</p>		

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 clean and tidy the work area before you begin sorting						
P1.2 sort donated goods by their type and condition						
P1.3 follow procedures for getting rid of items and parts that are not suitable for either selling or recycling						
P1.4 ask the right person for help if you cannot identify or classify unusual items						
P1.5 put goods suitable for recycling in suitable containers						
P1.6 place containers in the correct place ready for collection and check that they are not in anyone's way						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 identify goods that need to be cleaned, tidied or repaired						
P1.8 follow legal and company requirements for protecting health and safety while processing donated goods						
P1.9 clean, tidy or repair goods to meet legal and company requirements for saleable goods						

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Unit 4: **Load orders for despatch from a retail store to customers**

Unit code: B.29

Unit credit: 3

Unit level: 4

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Load orders for despatch from a retail store to customers - you need to know and understand:</p> <p>K1.1 why it is important to check the loading area regularly for obstacles, litter and spillages and how to do so</p> <p>K1.2 why it is important to clear away obstacles, litter and spillages promptly and how to do so safely</p> <p>K1.3 the information which must be shown on order labels</p> <p>K1.4 where orders need to be placed for loading</p> <p>K1.5 why it is important to check the condition of loading equipment regularly</p> <p>K1.6 how to clean and repair loading equipment and where to find replacements for faulty equipment which you are not responsible for fixing</p> <p>K1.7 how to lift and move packed orders without damaging them or injuring yourself or other people</p> <p>K1.8 how the positioning of orders in the vehicle can help the delivery process to run smoothly and efficiently</p> <p>K1.9 the company's procedures for positioning orders so that these remain secure and undamaged during transit</p>		

Additional evidence (if applicable):

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Element 1: Load orders for despatch from a retail store to customers

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 check the loading area regularly for obstacles, litter and spillages and clear these away safely and promptly						
P1.2 check that orders are clearly labelled with all the necessary information and placed in the right areas ready for loading						
P1.3 check regularly that loading equipment is fit for use						
P1.4 clean, repair or replace loading equipment promptly as needed						
P1.5 lift and move packed orders in ways which prevent damage and injury						
P1.6 follow instructions for positioning orders in the vehicle to ensure efficient delivery						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 follow company procedures for positioning orders so that they remain secure and protected from damage during transit						

Additional evidence (if applicable):

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What you must know

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

Knowledge	Type of evidence	Date
<p>1. Contribute to food safety in a retail environment - you need to know and understand:</p> <p>K1.1 how clean hair, skin, nails and clothing contribute to food safety and to giving the customer a positive impression of you and of the company</p> <p>K1.2 how jewellery and other accessories can put food safety at risk</p> <p>K1.3 the types of protective clothing you must wear at work</p> <p>K1.4 the right times to wash your hands, and how to wash your hands effectively</p> <p>K1.5 why you must avoid unsafe behaviour when you are working with or near food</p> <p>K1.6 why you must report any open wounds, skin infections and infectious illnesses, and who is the right person to report them to</p> <p>K1.7 the types of indicators of potential food safety hazards that you are expected to notice and identify in your workplace, and how to identify them</p> <p>K1.8 which indicators of potential food safety hazards you have authority to deal with, and company procedures for dealing with them</p> <p>K1.9 which indicators of potential food safety hazards you should report, and who to report them to</p>		

Additional evidence (if applicable):

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Element 1: Contribute to food safety in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<p>To meet the national standard you must:</p> <p>P1.1 keep yourself clean as you work, which means you:</p> <ul style="list-style-type: none"> • keep your hair, skin and nails in a suitable condition for working with food • remove any jewellery and other accessories that could cause food safety hazards • wear clean clothes including any protective clothing the company provides • wear the company's protective clothing correctly and change it when the company's rules say you must • wash your hands at the right times and using effective methods • avoid unsafe behaviour that could contaminate the food you are working with • report any open wounds, skin infections and infectious illnesses promptly to the right person • make sure any open wounds and skin infections are treated and covered with a suitable dressing 						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<p>To meet the national standard you must:</p> <p>P1.2 notice and remove or report indicators of potential food safety hazards as you work, which means you:</p> <ul style="list-style-type: none"> • notice and correctly identify obvious indicators of potential food safety hazards in the workplace • deal promptly and appropriately with indicators of potential food safety hazards when you have the authority to do so • report promptly to the right person any indicators of potential food safety hazards you do not have the authority to deal with yourself 						

Additional evidence (if applicable):

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Unit 6: **Provide a counter/takeaway service**

Unit code: C.58

Unit credit: 3

Unit level: 4

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Serve customers at the counter - you need to know and understand:</p> <p>K1.1 safe and hygienic working practices for serving customers at the counter and why these are important</p> <p>K1.2 why it is important to use separate serving equipment for each food item</p> <p>K1.3 why food and drink items must be served at the correct temperature</p> <p>K1.4 why portions must be controlled when serving customers</p> <p>K1.5 why information given to customers must be accurate</p> <p>K1.6 the types of unexpected situations that may occur when serving customers and how to deal with these</p>		
<p>2. Maintain counter and service areas - you need to know and understand:</p> <p>K2.1 safe and hygienic practices for clearing and why these are important</p> <p>K2.2 why food which is prepared first, should be served first</p> <p>K2.3 why maintaining food at the correct temperature is important and how you can ensure this</p> <p>K2.4 why counter service preparation areas and dining areas must be kept tidy and free from rubbish and food debris throughout service</p> <p>K2.5 why waste must be handled and disposed of correctly</p> <p>K2.6 why a constant stock of service items should be maintained</p> <p>K2.7 the types of unexpected situations that may occur when clearing away and how to deal with these</p>		

Additional evidence (if applicable):

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Element 1: Serve customers at the counter

What you must do

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

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

Additional evidence (if applicable):

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Element 2: Maintain counter and service areas

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 keep your work area tidy, hygienic and free from rubbish and food debris during service						
P2.2 maintain enough stocks of clean service items						
P2.3 restock with food and drink items when necessary						
P2.4 display and store food and drink items in line as required						
P2.5 clear the work area of used and un-required service items at the appropriate times						
P2.6 dispose of rubbish, used disposable items and food waste as required						

Additional evidence (if applicable):

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	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 7: **Keep stock at required levels in a retail environment**

Unit code: B.02

Unit credit: 3

Unit level: 4

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Check stock levels in a retail environment - you need to know and understand:</p> <p>K1.1 why accurate and up-to-date stock checks and records are important</p> <p>K1.2 company procedures for checking stock levels</p> <p>K1.3 why you should follow instructions and procedures for checking stock levels</p> <p>K1.4 how to check stock accurately</p> <p>K1.5 how to check stock levels so that you do not disturb other people any more than needed</p> <p>K1.6 reasons why the stock you are responsible for checking may be unsaleable</p> <p>K1.7 how to recognise unsaleable stock when you are checking stock levels</p> <p>K1.8 company procedures for updating stock records</p>		
<p>2. Fill shelves in a retail environment - you need to know and understand:</p> <p>K2.1 why stock needs positioning accurately</p> <p>K2.2 the safety risks of handling stock</p> <p>K2.3 how to handle stock without risking your own or other people's safety</p> <p>K2.4 how stock, premises and equipment can be damaged by poor stock handling</p> <p>K2.5 ways of handling stock so that stock, premises and equipment are not damaged</p> <p>K2.6 how to fill shelves so that you do not disturb other people any more than needed</p> <p>K2.7 why you should clean and tidy your work area promptly when you have finished</p> <p>K2.8 how to clean and tidy your work area, and the equipment and materials to use</p>		

Additional evidence (if applicable):

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Check stock levels in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 check existing stock levels accurately and in line with instructions and company procedures						
P1.2 ask the right person for advice if instructions for checking stock are not clear						
P1.3 spot unsaleable stock and promptly tell the right person						
P1.4 check stock levels in ways that do not disturb other people any more than needed						
P1.5 update stock records accurately and in line with company procedures						

Additional evidence (if applicable):

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

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Element 2: Fill shelves in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 follow instructions for positioning stock						
P2.2 promptly ask the right person for advice if instructions for positioning stock are not clear						
P2.3 handle stock in ways that protect your own and other people's safety						
P2.4 handle stock in ways that protect stock, equipment and premises from being damaged						
P2.5 fill shelves in ways that do not disturb other people any more than needed						
P2.6 promptly clean and tidy your work area when you have finished						

Additional evidence (if applicable):

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Unit 8: **Contribute to monitoring and maintaining ease of shopping in a retail sales area**

Unit code: C.51

Unit credit: 2

Unit level: 4

Introduction

This unit is about making the sales area clean and tidy and then monitoring the area and maintaining it to ensure it remains that way.

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Contribute to monitoring and maintaining ease of shopping in a retail sales area - you need to know and understand:</p>		
<p>K1.1 how the layout and appearance of the sales floor influences sales</p> <p>K1.2 company standards for the condition of the sales floor in relation to:</p> <ul style="list-style-type: none"> • cleanliness • tidiness • health and safety • positioning, condition and presentation of merchandise • positioning of information concerning products, prices and promotions <p>K1.3 when and how to check the sales floor meets company standards</p> <p>K1.4 how to balance checking the sales floor during trading hours with your other duties</p> <p>K1.5 how to recognise when the condition of the sales floor is not satisfactory and how to correct it</p> <p>K1.6 the right person to contact if you are unable to restore the condition of the sales floor to the required standard</p> <p>K1.7 how to identify realistic ways to improve the condition of the sales floor so as to encourage sales</p> <p>K1.8 how to spot and report problems that could have a negative effect on the customer's shopping experience</p> <p>K1.9 who you need to tell about any customer feedback you receive</p>		

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
<p>P1.1 check your area of the sales floor at suitable times to ensure:</p> <ul style="list-style-type: none"> • the area is clean, tidy and free from hazards and obstructions • merchandise is in a saleable condition and meets company standards for positioning and presentation • information concerning prices, products and promotions is clearly visible to customers 						
P1.2 maintain your area of the sales floor to the store standard without hindering customers from shopping						
P1.3 promptly report problems that could have a negative effect on the customer experience						
P1.4 tell the right person promptly about any customer feedback you receive						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Unit 9: **Wrap and pack goods for customers in a retail environment**

Unit code: C.01

Unit credit: 3

Unit level: 4

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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

Element 1: Package goods for customers in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 find out what items you must package						
P1.2 ask the right person for advice if instructions are not clear						
P1.3 choose packaging materials which meet legal requirements and company policy and which are suitable for the goods						
P1.4 gather the right quantities of packaging materials and the right tools for the job						
P1.5 use tools safely						
P1.6 cause as little wastage as possible						
P1.7 protect goods from damage while packaging them						
P1.8 close and seal packages neatly and in line with instructions						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.9 package goods within the time limits allowed						
P1.10 store materials and tools correctly and promptly after you have used them						
P1.11 get rid of waste correctly and promptly						

Additional evidence (if applicable):

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Unit 10: **Help to keep the retail unit secure**

Unit code: E.01

Unit credit: 4

Unit level: 4

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Identify and report security risks in a retail environment - you need to know and understand:</p> <p>K1.1 why workplace security matters</p> <p>K1.2 what can happen, to you and to the company, if the store is not kept secure</p> <p>K1.3 your responsibility for helping to keep the workplace secure by noticing and reporting security risks</p> <p>K1.4 the types of security risk you need to be alert for, including:</p> <ul style="list-style-type: none"> • shoplifting • theft by staff • aggressive customers • vandalism • terrorist activity <p>K1.5 how to identify security risks</p> <p>K1.6 situations that can make you less alert for security risks, and how to deal with these situations</p> <p>K1.7 why you must report security risks promptly and accurately</p> <p>K1.8 who to report security risks to and how to communicate these risks</p> <p>K1.9 the reasons why you should not take on more responsibility than you are authorised to do when faced with security risks, including:</p> <ul style="list-style-type: none"> • personal safety • legal considerations • company policy 		

Additional evidence (if applicable):

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Element 1: Identify and report security risks in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 notice and correctly identify security risks						
P1.2 follow company procedures for reporting security risks						
P1.3 report security risks to the right people promptly and accurately						
P1.4 follow company procedures for preventing security risks while you work						
P1.5 notice where stock may have been stolen and tell the right person about it						

Additional evidence (if applicable):

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Unit 11: **Help to maintain health and safety in a retail environment**

Unit code: E.02

Unit credit: 5

Unit level: 4

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Identify and report accidents and emergencies in a retail environment - you need to know and understand:</p> <p>K1.1 the types of accident and emergency that tend to happen in stores and why they happen</p> <p>K1.2 how to get help in the event of an accident or emergency</p> <p>K1.3 the action you can safely and usefully take while waiting for help to arrive</p> <p>K1.4 why you must not take on more responsibility than you are authorised to do when accidents and emergencies happen, including:</p> <ul style="list-style-type: none"> • personal safety • legal considerations • company policy 		
<p>2. Protect health and safety as you work in a retail environment - you need to know and understand:</p>		
<p>K2.1 the types of health and safety risk that can arise in a store environment</p> <p>K2.2 company procedures and legal requirements for reducing health and safety risks as far as possible while you work</p> <p>K2.3 what can happen to you and to the company if you do not follow health and safety procedures</p> <p>K2.4 the safety equipment you need to use and why you need to use it</p> <p>K2.5 approved procedures for using safety equipment</p> <p>K2.6 who can provide advice and help if you are concerned about your ability to work safely</p>		

Knowledge	Type of evidence	Date
<p>3. Lift and handle goods safely in a retail environment - you need to know and understand:</p> <p>K3.1 how to find out what you can lift safely</p> <p>K3.2 how to find out the weight of the loads you are asked to lift</p> <p>K3.3 company guidelines for not lifting more than is safe</p> <p>K3.4 why you should plan your route when moving goods</p> <p>K3.5 how to plan your route when moving goods, including the types of obstacles to look for and how to remove or avoid them</p> <p>K3.6 approved techniques for safe handling and lifting</p> <p>K3.7 company guidelines and manufacturers' instructions for using lifting and handling equipment</p> <p>K3.8 how using unsafe techniques for lifting and handling can affect you, the people lifting with you, and others close by</p>		

Additional evidence (if applicable):

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

Element 1: Identify and report accidents and emergencies in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 notice and correctly identify accidents and emergencies						
P1.2 get help promptly and in the most suitable way						
P1.3 follow company policy and procedures for preventing further injury while waiting for help to arrive						
P1.4 act within the limits of your responsibility and authority when accidents and emergencies arise						
P1.5 promptly follow instructions given by senior staff and the emergency services						

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 follow company procedures and legal requirements for reducing health and safety risks as far as possible while you work						
P3.2 use safety equipment correctly and in the right situations						
P3.3 get advice and help from the right people when you are concerned about your ability to work safely						

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 3: Protect health and safety as you work in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 take suitable safety measures before lifting to protect yourself and other people						
P3.2 use approved lifting and handling techniques						
P3.3 check that any equipment you need to use is fit for use						
P3.4 use lifting and handling equipment in line with company guidelines and manufacturers' instructions						
P3.5 plan a safe and efficient route for moving goods						
P3.6 make sure that you understand our responsibilities when you ask others to help in lifting and handling operations						

Additional evidence (if applicable):

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	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
COLUMN KEY:	P = PRODUCTS OF THE LEARNER'S WORK	WT = AUTHENTIC STATEMENTS/WITNESS TESTIMONY
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	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Unit 12: **Keep the retail environment clean and hygienic (non-food)**

Unit code: E.04

Unit credit: 3

Unit level: 4

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Keep work surfaces clean in a retail environment - you need to know and understand:</p> <p>K1.1 company procedures for cleaning work surfaces</p> <p>K1.2 the equipment and materials for cleaning work surfaces and their uses</p> <p>K1.3 where cleaning equipment and materials are stored, and why you should put them away promptly after use</p> <p>K1.4 why you must position cleaning equipment and materials and other items safely, and how to do so</p> <p>K1.5 the health and safety risks posed by spillages and why you must clean up spillages promptly</p> <p>K1.6 how to follow the Control of Substances Hazardous to Health Regulations (COSHH) when carrying out routine cleaning and when dealing with spillages</p> <p>K1.7 techniques for reducing as far as possible the risk of spillages and how to clean up spillages thoroughly</p> <p>K1.8 why you should get rid of rubbish and waste promptly and safely, and how to do so</p> <p>K1.9 why you should disturb other people as little as possible while cleaning, and how to do so</p> <p>K1.10 company standards for clean work surfaces, and how to check you have achieved them</p>		

Knowledge	Type of evidence	Date
<p>2. Get rid of waste and litter in a retail environment - you need to know and understand:</p>		
K2.1 why work areas should be kept free of waste and litter, including health and safety reasons		
K2.2 the safe methods for getting rid of waste and litter		
K2.3 the equipment to use and how to check it is safe to use		
K2.4 company procedures for getting rid of waste and litter		
K2.5 where equipment is stored and why you should put it away promptly after use		
K2.6 how to cause the least disturbance to other people when getting rid of waste and litter		
<p>3. Maintain personal hygiene in a retail environment - you need to know and understand:</p>		
K3.1 why hygiene is important in your workplace, and how keeping yourself clean contributes to this		
K3.2 how a clean and tidy appearance helps to give customers a positive impression of you and the organisation		
K3.3 effective cleaning practices and techniques for keeping your hair, skin and nails clean enough for the work you do		

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 1: Keep work surfaces clean in a retail environment

What you must do

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

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Element 2: Get rid of waste and litter in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 use suitable equipment to tidy work areas						
P2.2 check that equipment is safe to use before starting to use it						
P2.3 get rid of waste and litter safely and in line with company procedures						
P2.4 disturb other people as little as possible while getting rid of waste and litter						
P2.5 store equipment correctly and promptly after use						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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

Element 3: Maintain personal hygiene in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 wear protective clothing that is clean and suitable for the work you need to do						
P3.2 dispose correctly of used clothing and products						
P3.3 use effective practices and techniques for keeping your hair, skin and nails clean enough for the work you do						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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

Unit 13: **Receive goods and materials into storage in a retail environment**

Unit code: B.03

Unit credit: 4

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Prepare to receive deliveries in a retail environment - you need to know and understand:</p> <p>K1.1 why you need to prepare thoroughly to receive deliveries</p> <p>K1.2 the information you need about the quantity and nature of deliveries, and how to access and interpret this information</p> <p>K1.3 how to identify the quantity and type of storage space needed, and how to check if this is available</p> <p>K1.4 who to tell about any shortage of storage space, and why you should do so promptly</p> <p>K1.5 company procedures for receiving deliveries</p> <p>K1.6 why accurate, complete and up-to-date paperwork is needed, and the possible consequences of not having this</p> <p>K1.7 the paperwork you must check and how to identify problems with it</p> <p>K1.8 legal and company requirements for maintaining security and safety during deliveries, and how these relate to the preparations you are required to make</p>		
<p>2. Receive deliveries into storage in a retail environment - you need to know and understand:</p> <p>K2.1 the handling equipment you need, where to find it and how to use it</p> <p>K2.2 how to recognise faulty equipment</p> <p>K2.3 who to tell about any faulty equipment that you are not responsible for fixing</p>		

Knowledge	Type of evidence	Date
<p>2. Receive deliveries into storage in a retail environment - you need to know and understand:</p> <p>K2.4 why you must handle goods safely and hygienically, and how to do so</p> <p>K2.5 why you must handle goods without damaging them, and how to do so</p> <p>K2.6 where deliveries should be offloaded</p> <p>K2.7 legal and company requirements for maintaining security and safety while receiving deliveries</p>		

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Prepare to receive deliveries in a retail environment

What you must do

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

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

Additional evidence (if applicable):

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

Element 2: Receive deliveries into storage in a retail environment

What you must do

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

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

Additional evidence (if applicable):

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

Unit 14: **Put goods and materials into storage in a retail environment**

Unit code: B.04

Unit credit: 4

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Check storage arrangements for goods and materials in a retail environment - you need to know and understand:</p> <p>K1.1 possible causes of the goods and materials you work with deteriorating in storage</p> <p>K1.2 the types of storage facilities and conditions that stop the goods and materials you work with deteriorating</p> <p>K1.3 the storage facilities available in your workplace and their relevant features</p> <p>K1.4 how to check that suitable storage places are available and fit for use</p> <p>K1.5 who to tell if there aren't enough suitable storage places</p> <p>K1.6 the handling equipment used for storing goods and materials and how to check that it is available for use</p>		
<p>2. Put goods and materials into storage in a retail environment - you need to know and understand:</p> <p>K2.1 legal and company requirements for storing deliveries safely and securely</p> <p>K2.2 why stock needs to be rotated</p> <p>K2.3 how to position goods so that batches of stock can be reached easily and in the right order</p> <p>K2.4 the instructions you need for storing deliveries in the right places and in the right order</p> <p>K2.5 where to get instructions for storing deliveries</p> <p>K2.6 how to work safely, securely and efficiently when putting deliveries into storage</p>		

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 identify the storage requirements and conditions for the goods and materials you are responsible for storing						
P1.2 check accurately that suitable storage places are available and in a fit state to use						
P1.3 tell the right person promptly when there aren't enough suitable storage locations						
P1.4 check accurately that suitable handling equipment is available for use						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Element 2: Put goods and materials into storage in a retail environment

What you must do

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

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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

Unit 15: **Keep stock on sale at required levels in a retail environment**

Unit code: B.05

Unit credit: 3

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Check the level of stock on sale in a retail environment - you need to know and understand:</p> <p>K1.1 why the store needs to carry the right levels of stock</p> <p>K1.2 why the quality of stock needs checking regularly</p> <p>K1.3 the maximum and minimum levels of stock that need to be on display</p> <p>K1.4 the factors that can affect demand for stock, and how to work out how often to check stock levels</p> <p>K1.5 how to plan and organise your time so that you check stock at suitable intervals</p> <p>K1.6 how to use the stock control system to identify current stock levels, the stock levels needed and any shortfalls in stock</p> <p>K1.7 how to identify unsaleable stock</p> <p>K1.8 how to deal with unsaleable stock</p> <p>K1.9 how to update the stock control system to reflect changes in stock levels</p>		
<p>2. Replenish stock on sale in a retail environment - you need to know and understand:</p> <p>K2.1 how to use the stock control system to identify the types and quantities of stock to order</p> <p>K2.2 how to prepare and send orders for stock, and why you should do so accurately and at the right times</p> <p>K2.3 how to prepare different types of stock for sale</p>		

Knowledge	Type of evidence	Date
<p>2. Replenish stock on sale in a retail environment - you need to know and understand:</p> <p>K2.4 company procedures for recycling packaging waste</p> <p>K2.5 how to decide when to move stock to the sales floor and the arrangements to make for moving stock</p> <p>K2.6 why stock needs rotating</p> <p>K2.7 how to rotate stock correctly and without disturbing other people any more than needed</p> <p>K2.8 why you should regularly check demand for stock</p> <p>K2.9 factors that can affect demand</p> <p>K2.10 who to approach with suggestions for changes to the levels of stock carried</p> <p>K2.11 how to present a clearly reasoned case for changing the levels of stock carried</p>		

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 use the stock control system to identify current stock levels, the stock levels needed and any shortfalls in stock						
P1.2 work out how often to check stock so that there will be enough time to replace stocks before they run out						
P1.3 check stock levels at suitable intervals						
P1.4 tell the right person promptly when stock needs replacing						
P1.5 notice when stock has passed its expiry date and promptly remove it from sale and update the stock control system						

Additional evidence (if applicable):

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

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 2: Put goods and materials into storage in a retail environment

What you must do

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

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

Additional evidence (if applicable):

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

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

Unit 16:	Process customer orders for goods in a retail environment
Unit code:	B.06
Unit credit:	3
Unit level:	5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Check the availability of goods for retail orders - you need to know and understand:</p> <p>K1.1 how to ask the right questions to find out exactly what customers want</p> <p>K1.2 which items are held in stock</p> <p>K1.3 how to check whether there is enough stock to meet the order</p> <p>K1.4 which items are available by order and which suppliers and manufacturers can provide them</p> <p>K1.5 how to check whether external suppliers and manufacturers can provide items, and on what terms</p> <p>K1.6 why you should keep customers informed of progress in finding the goods they need</p> <p>K1.7 why you should give customers clear, accurate and complete information about the terms of supply</p>		
<p>2. Process orders for retail customers - you need to know and understand:</p> <p>K2.1 legal and company procedures for checking the customer's identity and credit status, and why you must follow them</p> <p>K2.2 who is responsible for fulfilling customers' orders, what information they need from you, and why they need it</p> <p>K2.3 who is responsible for invoicing customers for orders, what information they need from you, and why they need it</p> <p>K2.4 who to tell if you cannot process an order</p>		

Knowledge	Type of evidence	Date
<p>2. Process orders for retail customers - you need to know and understand:</p> <p>K2.5 why you should tell the customer promptly about any delays in fulfilling their order</p> <p>K2.6 legal and company requirements relating to customer confidentiality</p> <p>K2.7 what might happen if customer information is not kept confidential</p> <p>K2.8 company procedures for storing customer information securely</p> <p>K2.9 who is entitled to see customer information, and in what situations</p>		

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 1: Check the availability of goods for retail orders

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 identify customers' needs accurately by asking suitable questions						
P1.2 identify the goods that will meet customers' needs and check with customers that these are satisfactory						
P1.3 find out who can supply the goods needed and on what terms						
P1.4 keep customers informed of progress in finding the goods they need						
P1.5 give customers clear, accurate and complete information about the availability of goods and the terms of supply						

Additional evidence (if applicable):

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

Element 2: Process orders for retail customers

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 follow legal and company procedures for checking the customer's identity and credit status						
P2.2 follow company policy for offering to order goods the customer needs if they are not in stock						
P2.3 prepare accurate, clear and complete information about the order and pass this information promptly to the people responsible for fulfilling the order						
P2.4 provide accurate, clear, complete and timely information to those responsible for issuing the invoice						
P2.5 tell the right person promptly when you cannot process an order and explain the reasons clearly						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 let the customer know promptly and politely if their order cannot be fulfilled within the time agreed						
P2.7 store customers' details securely and show them only to people who have a right to see them						

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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Assessor signature: _____ Date: _____

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

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

Unit 17: Process returned goods and materials in a retail environment

Unit code: B.07

Unit credit: 3

Unit level: 5

Introduction

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Help retail customers who need to return goods - you need to know and understand:</p> <p>K1.1 the main reasons customers might have for returning goods</p> <p>K1.2 the customer's legal rights to replacements and refunds</p> <p>K1.3 company policies and procedures for replacements and refunds, including proof of purchase</p> <p>K1.4 how much authority you have to agree to replacements and refunds, and who to ask for help when you need authorisation</p> <p>K1.5 any charges that apply when your company is not at fault</p> <p>K1.6 where to find replacement goods</p> <p>K1.7 company procedures for preparing replacement goods for giving or sending to the customer</p> <p>K1.8 how customers should return unwanted goods</p>		
<p>2. Process returns of retail goods - you need to know and understand:</p> <p>K2.1 who can raise credit notes and refund payments, and the information they need</p> <p>K2.2 how to update the stock control system accurately and fully and why you should do so promptly</p> <p>K2.3 how to label goods for return to the supplier or manufacturer</p> <p>K2.4 where to place returned goods that cannot be re-sold</p> <p>K2.5 where to place returned goods that can be re-sold</p>		

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Help retail customers who need to return goods

What you must do

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

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Element 2: Process returns of retail goods

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 check accurately the type, quantity and condition of returned goods						
P2.2 give accurate and complete information to the person who can raise a credit note or refund the payment						
P2.3 update the stock control system promptly, accurately and fully						
P2.4 label clearly any goods that are to be returned to the supplier or manufacturer						
P2.5 move returned goods to the correct place and position unsaleable goods separately from sales stock						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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

Unit 18:	Prepare products for sale to customers in a retail environment
Unit code:	B.09
Unit credit:	3
Unit level:	5

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Prepare products for selling to retail customers

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 check that all expected items and parts of the product are in the package						
P1.2 remove all unwanted packaging						
P1.3 follow legal and company procedures for preparing waste and unwanted packaging for recycling						
P1.4 gather the tools you need for putting products together						
P1.5 use safe work methods and follow manufacturers' instructions when putting products together						
P1.6 check that products have been assembled correctly and can be used safely						
P1.7 ask the right person for help when products are proving difficult to put together						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.8 check regularly that products on display are in a satisfactory condition						
P1.9 promptly remove damaged products from display and follow company procedures for dealing with them						

Additional evidence (if applicable):

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Unit 19: **Process bake-off products for sale in a retail environment**

Unit code: B.10

Unit credit: 6

Unit level: 5

Introduction

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

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

What you must know

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

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

Additional evidence (if applicable):

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

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

What you must do

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

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

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

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

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

What you must do

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

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

Additional evidence (if applicable):

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

Assessor signature: _____ Date: _____

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

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

Unit 20: **Process greengrocery products for sale in a retail environment**

Unit code: B.12

Unit credit: 9

Unit level: 5

Introduction

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

What you must know

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

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

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

Additional evidence (if applicable):

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

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

What you must do

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

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

Additional evidence (if applicable):

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Element 2: Display greengrocery products to attract retail sales

What you must do

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

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

Additional evidence (if applicable):

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Unit 21: **Finish meat products by hand in a retail environment**

Unit code: B.13

Unit credit: 9

Unit level: 5

Introduction

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

What you must know

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

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

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

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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

What you must do

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

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

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Element 3: Achieve meat product yield and finish in a retail environment

What you must do

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

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

Additional evidence (if applicable):

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Unit 22: **Maintain food safety while working with food in a retail environment**

Unit code: B.21

Unit credit: 8

Unit level: 5

Introduction

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

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Maintain food safety while working with food in a retail environment - you need to know and understand:</p> <p>K1.1 how personal hygiene and behaviour affect food safety in the workplace</p> <p>K1.2 the types of illness the law requires you to report to your employer</p> <p>K1.3 why you must treat and cover open wounds and skin infections, and how to do so</p> <p>K1.4 how food handling practices affect food safety in the workplace</p> <p>K1.5 why you must keep your immediate work area clean and tidy</p> <p>K1.6 the company's schedules and procedures for cleaning the workplace and why you must follow these</p> <p>K1.7 why you must keep certain foods at specified temperatures and how to do so</p> <p>K1.8 your company's schedule and procedures for checking and reporting the condition of food and food storage areas, and why you must follow these</p> <p>K1.9 the main types of infestation; how they can happen; how to prevent them; how to recognise them and what to do if you discover them</p> <p>K1.10 the main types of food safety hazard and cross-contamination; how they can happen; how to prevent or reduce the risk of them happening; and what to do if you discover indicators of food safety hazards or cross-contamination</p> <p>K1.11 the causes of food spoilage, how to recognise food spoilage and what to do if you discover it</p>		

Additional evidence (if applicable):

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Element 1: Maintain food safety while working with food in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<p>To meet the national standard you must:</p> <p>P1.1 keep yourself clean as you work, which means you:</p> <ul style="list-style-type: none"> • keep your hair, skin and nails in a suitable condition for working with food • remove any jewellery and other accessories that could cause food safety hazards • wear clean clothes including any protective clothing the company provides • wear the company's protective clothing correctly and change it when the company's rules say you must • wash your hands at the right times and using effective methods • avoid unsafe behaviour that could contaminate the food you are working with 						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
<ul style="list-style-type: none"> report any open wounds, skin infections and infectious illnesses promptly to the right person make sure any open wounds and skin infections are treated and covered with a suitable dressing 						
<p>P1.2 keep your workspace in the right condition for working with food, which means you:</p> <ul style="list-style-type: none"> keep your immediate work area clean and tidy as you work carry out any scheduled cleaning at the right times and in line with company procedures keep tools, utensils and equipment in good working order, in a hygienic condition and stored correctly 						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<p>To meet the national standard you must:</p> <p>P1.3 work in a way that keeps food safe for customers, which means you:</p> <ul style="list-style-type: none"> • follow company procedures to dispose of food waste promptly and hygienically • protect food from food safety hazards and cross-contamination as you work • follow company procedures for dealing with contaminated food • follow company procedures for items that may cause allergic reactions • label products clearly with the correct use-by dates 						
<p>P1.4 check and record the condition of the food you are responsible for, which means you:</p> <ul style="list-style-type: none"> • check food and food storage areas in line with the company's schedules and procedures • follow company procedures for keeping accurate and complete records of the checks you make • follow company procedures for any indicators of potential food safety hazards you have authority to deal with • promptly report to the right person any indicators of potential food safety hazards you don't have authority to deal with yourself 						

Additional evidence (if applicable):

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Unit 23: **Receive driver-controlled deliveries of fuel on a petrol forecourt**

Unit code: B.23

Unit credit: 7

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Prepare to receive deliveries of motor fuel on a forecourt - you need to know and understand:</p> <p>K1.1 what equipment and materials are needed for safe and effective delivery; what they are used for; where to find them; and how to check they are available and in working order</p> <p>K1.2 the documentation you need, and how to interpret it</p> <p>K1.3 typical problems that occur in relation to deliveries; which problems you are authorised to resolve, and how to do so; which problems you are not authorised to resolve, and who to refer them to</p> <p>K1.4 how to work out the amount of space available in the storage tanks on your forecourt</p> <p>K1.5 how motor fuel can be dangerous</p> <p>K1.6 typical hazards on and around the forecourt and how to remove them, make them safe, record and report them</p> <p>K1.7 how to set up a hazardous zone around the delivery area and cone off the area</p>		
<p>2. Check that driver-controlled deliveries of motor fuel have been completed safely - you need to know and understand:</p> <p>K2.1 the safety checks the tanker driver is responsible for making when fuel delivery is complete, and why these checks are needed</p> <p>K2.2 company procedures for confirming with the driver that the necessary safety checks have been made</p>		

Knowledge	Type of evidence	Date
<p>2. Check that driver-controlled deliveries of motor fuel have been completed safely - you need to know and understand:</p>		
<p>K2.3 typical safety hazards associated with driver-controlled deliveries and how to spot these, remove them or make them safe, record them and report them</p>		
<p>K2.4 company procedures for confirming with the tanker driver that the expected type and amount of fuel has been delivered to each tank</p>		
<p>K2.5 the documentation you need to complete, and how to complete it</p>		

Additional evidence (if applicable):

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Element 1: Prepare to receive deliveries of motor fuel on a forecourt

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 find out the expected delivery time and the type and amount of fuel expected and check these against the relevant documentation						
P1.2 check that there is enough space in the relevant storage tanks for the expected fuel						
P1.3 check that the equipment and materials needed to ensure safe and effective fuel delivery are available and in working order						
P1.4 identify potential hazards and follow legal and company requirements for removing them or making them safe						
P1.5 record and report potential hazards in line with legal and company requirements						
P1.6 give the tanker driver adequate information about the space in the storage tanks						
P1.7 tell the tanker driver where to find the relevant health and safety equipment						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.8 follow legal and company requirements for setting up a hazardous zone around the fuel delivery area and coning off the area						
P1.9 spot problems relating to expected deliveries and resolve these problems promptly, in line with legal and company requirements and within the limits of your authority						
P1.10 where you are not authorised to resolve problems relating to expected deliveries, refer these problems promptly to the right person						

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 follow company procedures for confirming with the driver that the necessary safety checks have been made						
P2.2 spot any safety hazards remaining after delivery, remove them or make them safe and record or report them						
P2.3 follow company procedures for confirming with the tanker driver that the expected type and amount of fuel has been delivered to each tank						
P2.4 follow company procedures for completing the relevant documentation						

Additional evidence (if applicable):

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COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 24:	Control deliveries of motor fuel in a forecourt
Unit code:	B.24
Unit credit:	7
Unit level:	5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Prepare to receive deliveries of motor fuel on a forecourt - you need to know and understand:</p> <p>K1.1 what equipment and materials are needed for safe and effective delivery; what they are used for; where to find them; and how to check they are available and in working order</p> <p>K1.2 the documentation you need, and how to interpret it</p> <p>K1.3 typical problems that occur in relation to deliveries; which problems you are authorised to resolve, and how to do so; which problems you are not authorised to resolve, and who to refer them to</p> <p>K1.4 how to work out the amount of space available in the storage tanks on your forecourt</p> <p>K1.5 how motor fuel can be dangerous</p> <p>K1.6 typical hazards on and around the forecourt and how to remove them, make them safe, record and report them</p> <p>K1.7 how to set up a hazardous zone around the delivery area and cone off the area</p>		
<p>2. Control deliveries of motor fuel on a forecourt - you need to know and understand:</p> <p>K2.1 the delivery details you need to check before fuel is transferred to the tanks</p> <p>K2.2 how to check that the details in the delivery documents match the order, including details of the type and quantity of fuel</p> <p>K2.3 typical problems with fuel deliveries and how to solve them</p> <p>K2.4 the paperwork you need to complete and how to complete it</p>		

Knowledge	Type of evidence	Date
<p>2. Control deliveries of motor fuel on a forecourt - you need to know and understand:</p> <p>K2.5 typical safety hazards associated with fuel deliveries and the legal and company requirements for dealing with them</p> <p>K2.6 what to do in the event of an emergency, such as a fuel spill</p> <p>K2.7 how to make the site ready for normal use after delivery</p> <p>K2.8 the personal hygiene requirements associated with fuel delivery</p>		

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 1: Prepare to receive deliveries of motor fuel on a forecourt

What you must do

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

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

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

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Element 2: Control deliveries of motor fuel on a forecourt

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 before taking delivery of fuel, check that the details in the delivery documents match the order, including details of the type and quantity of fuel ordered						
P2.2 spot any problems with the fuel delivery, take suitable action within the limits of your authority, and refer to the right person any problems you are not authorised to solve						
P2.3 throughout the delivery, remain alert for potential safety hazards and emergencies and deal with these promptly and in line with legal and company requirements						
P2.4 complete all the necessary paperwork in line with company requirements						
P2.5 make the site ready for normal use when the delivery is complete						
P2.6 follow personal hygiene requirements after delivery						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 25:	Pick products in a retail store to fulfil customer orders
Unit code:	B.28
Unit credit:	4
Unit level:	5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Pick products in a retail store to fulfil customer orders - you need to know and understand:</p> <p>K1.1 the layout of the store and how to work out the most efficient routes around the store for picking customer orders</p> <p>K1.2 why it is important to try not to inconvenience other people in the store as you pick products</p> <p>K1.3 how to pick products in ways that cause the least possible inconvenience to other people in the store whilst ensuring that orders are picked within the required time</p> <p>K1.4 how to interpret picking instructions and who to ask for advice if picking instructions are unclear</p> <p>K1.5 what counts as 'saleable quality' for the goods in your store and how to check the quality of the goods you pick</p> <p>K1.6 the common types of damage and deterioration which can affect products during picking, and how to prevent these</p> <p>K1.7 the company's procedures for recording picked products and prices</p> <p>K1.8 the company's policy and procedures for choosing alternatives when the products requested by the customer are not in stock</p> <p>K1.9 how to avoid mixing up orders when picking for more than one customer</p> <p>K1.10 the containers and packing methods to use to ensure that orders will remain in saleable condition during transit</p> <p>K1.11 how to pack goods so as to keep them in saleable condition without using excessive amounts of packaging</p>		

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Pick products in a retail store to fulfil customer orders

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 plan a route around the store which is efficient and which enables you to pick orders within the time allowed						
P1.2 pick products in ways that minimise the inconvenience caused to other people in the store, whilst ensuring that orders are picked within the required time						
P1.3 ask the right person for advice if picking instructions are unclear						
P1.4 check that the products you pick are of saleable quality						
P1.5 protect picked products from damage and deterioration throughout the picking process						
P1.6 follow company procedures for recording picked products and price						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 follow company policy and procedures for choosing alternatives when the products requested by the customer are not in stock						
P1.8 use effective methods for separating products for different orders when picking for more than one customer						
P1.9 pack orders so as to keep them in saleable condition without using excessive packaging						
P1.10 put packed orders in the right places ready for collection or despatch						

Additional evidence (if applicable):

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

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

Unit 26: **Check stock levels and sort out problems with stock levels in a retail store**

Unit code: B.30

Unit credit: 2

Unit level: 5

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 1: Check stock levels and sort out problems with stock levels

What you must do

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 tell the right person promptly about any problems with stock and stock levels which you are not authorised to deal with yourself						

Additional evidence (if applicable):

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Unit 27: **Hand-process fish in a retail environment**

Unit code: B.31

Unit credit: 8

Unit level: 5

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Hand-process fish in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 organise your work area, equipment and tools so that you can hand-process fish safely, hygienically and efficiently						
P1.2 maintain hygienic working conditions when checking and hand-processing fish						
P1.3 check that the fish you have been asked to prepare are of saleable quality						
P1.4 hand process fish in ways that: <ul style="list-style-type: none"> • achieve specifications for yield and quality • minimise waste • keep fish in a saleable condition throughout processing • maintain your own and other people's health and safety 						
P1.5 dispose of waste in ways that are safe and hygienic and that meet legal and company requirements for recycling						

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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

Unit 28: **Contribute to the control and efficiency of dough production in a retail environment**

Unit code: B.32

Unit credit: 4

Unit level: 5

Introduction

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

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

What you must know

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

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

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

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

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

What you must do

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

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

Additional evidence (if applicable):

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

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 in relation to the efficiency and effectiveness of dough processing, make suggestions for improvement which are: <ul style="list-style-type: none"> • realistic • based on accurate information 						
P2.2 share your suggestions for improvement with the right person						
P2.3 explain your suggestions positively and in enough detail for further action to be agreed						
P2.4 react positively to feedback about your suggestions						

Additional evidence (if applicable):

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Unit 29: **Select, weigh and measure bakery ingredients**

Unit code: B.33

Unit credit: 6

Unit level: 5

Introduction

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. For the whole unit, you need to know and understand:</p> <p>K1.1 to what standards of health & safety and food safety you are required to work, why it is important that you do so and what might happen if they are not met</p> <p>K1.2 common factors affecting quality of ingredients, during handling, weighing, measuring and storage</p> <p>K1.3 the importance of handling and preparing ingredients at the optimum temperature and conditions for effective weighing, measuring and eventually mixing</p> <p>K1.4 how to avoid contamination of ingredients during handling, weighing, measuring and storage and what might happen if this is not done</p> <p>K1.5 how to recognise and report substandard ingredients, signs of contamination, infestation or damage to ingredients and packaging</p> <p>K1.6 what the lines and methods of effective communication are and why it is important to use them</p> <p>K1.7 what the documentation requirements are and why it is important to meet them</p> <p>K1.8 personal protective clothing/equipment and working practices which are useful in combating potentially harmful effects of dust from ingredients and allergies from skin contact with ingredients</p> <p>K1.9 how to use work instructions and product specifications or recipes to calculate or adjust the ratio of ingredients required and ensure these meet production needs</p> <p>K1.10 the importance of working within time constraints required by production schedule</p> <p>K1.11 how to report non availability of ingredients and source alternative supplies of ingredients or alternative ingredients as permitted</p>		

Knowledge	Type of evidence	Date
<p>1. For the whole unit, you need to know and understand:</p>		
<p>K1.12 the importance of using the correct type of weighing and measuring equipment according to the types and quantities of ingredients used</p>		
<p>K1.13 how to safely label and store ingredients ready for mixing or further processing</p>		

Additional evidence (if applicable):

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

Element 1: Identify ingredients

What you must do

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

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

Additional evidence (if applicable):

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Element 2: Select ingredients

What you must do

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

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

Additional evidence (if applicable):

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Element 3: Weigh and measure ingredients

What you must do

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

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

Additional evidence (if applicable):

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Unit 30: **Hand divide, mould and shape fermented doughs**

Unit code: B.34

Unit credit: 6

Unit level: 5

Introduction

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

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

What you must know

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

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

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

Additional evidence (if applicable):

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Element 1: Hand divide fermented dough

What you must do

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

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

Additional evidence (if applicable):

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Element 2: Hand mould and shape fermented dough

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 check the available portioned dough against your instructions and specifications and take prompt action on discovering any discrepancy						
P2.2 prepare and maintain an appropriate table surface for moulding and shaping						
P2.3 hand mould and shape portioned dough accurately and reliably						
P2.4 wash and dress shaped dough surfaces as required to specification						
P2.5 work with practice which minimizes waste and correctly deal with scrap material						
P2.6 place dough in the correct condition and location, for further processing						
P2.7 comply with health, safety, food safety and organisational requirements throughout moulding and shaping operations						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.8 operate within the limits of your own authority and capabilities						

Additional evidence (if applicable):

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Unit 31:	Display stock to promote sales to customers in a retail environment
Unit code:	C.02
Unit credit:	6
Unit level:	5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Prepare display areas and materials in a retail store - you need to know and understand:</p> <p>K1.1 why you need to be clear about display requirements for stock, space, position of the display and dates, and where to get this information</p> <p>K1.2 who to ask for advice and help in solving problems with display plans</p> <p>K1.3 how to identify what you need for a display from plans and sketches</p> <p>K1.4 why you must check for possible dangers to health and safety before setting up displays</p> <p>K1.5 how to check whether displays will cause an obstruction</p>		
<p>2. Set up and dismantle displays in a retail store - you need to know and understand:</p> <p>K2.1 the value of displays and promoting new products</p> <p>K2.2 how placing products in specific places attracts attention and promotes sales</p> <p>K2.3 how to use space effectively when displaying products</p> <p>K2.4 why you must check for possible dangers to health and safety when setting up and dismantling displays</p> <p>K2.5 how to check that the equipment you need to use is in working order</p> <p>K2.6 why you should clean and store the materials and equipment you use in displays and get rid of waste safely</p> <p>K2.7 how to identify and correct unsafe displays</p>		

Knowledge	Type of evidence	Date
<p>3. Label displays of stock in a retail store - you need to know and understand:</p> <p>K3.1 how proper labelling promotes sales</p> <p>K3.2 the legal requirements for labelling and what can happen if you do not meet these</p> <p>K3.3 the importance of checking that labels are clear and accurate</p> <p>K3.4 who to tell about information that may need changing on labels</p> <p>K3.5 how to use labelling materials and equipment efficiently and effectively</p>		

Additional evidence (if applicable):

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Element 1: Prepare display areas and materials in a retail store

What you must do

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

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

Additional evidence (if applicable):

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Element 2: Set up and dismantle displays in a retail store

What you must do

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

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

Additional evidence (if applicable):

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Element 3: Label displays of stock in a retail store

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 check the requirements for labelling stock						
P3.2 check that the information on the label is clear, accurate and legal before starting to label stock						
P3.3 report promptly and to the right person any information on labels that may need changing						
P3.4 attach the right labels to the right products						
P3.5 position labels so that they are securely fastened and customers can see them clearly						
P3.6 complete labelling within the time allowed						

Additional evidence (if applicable):

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Unit 32: **Help customers choose products in a retail environment**

Unit code: C.03

Unit credit: 8

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Help customers choose products in a retail store - you need to know and understand:</p> <p>K1.1 why you need to promote sales and goodwill, and how helping customers to choose products contributes to this</p> <p>K1.2 the products you are responsible for selling and their features and benefits</p> <p>K1.3 why you need to explain product features and benefits to customers in ways that they understand and find interesting</p> <p>K1.4 how to check and interpret customers' responses to your explanations</p> <p>K1.5 how to adapt your explanations and respond to questions and comments in ways that promote sales and goodwill</p> <p>K1.6 how to encourage customers to ask you for clarification and more information</p> <p>K1.7 the risks of not paying attention to the store, in terms of security, safety and lost sales</p>		
<p>2. Check the customer's preferences and buying decisions when making retail sales - you need to know and understand:</p> <p>K2.1 how to recognise buying signals from customers</p> <p>K2.2 how to handle customers' questions confidently and effectively</p> <p>K2.3 techniques for closing the sale</p> <p>K2.4 why customer confidence and loyalty matter to the store and how you contribute towards these</p> <p>K2.5 legal rights and responsibilities of retailers and customers to do with returning of unsatisfactory goods</p>		

Additional evidence (if applicable):

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COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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Candidate signature: _____ Date: _____

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Help customers choose products in a retail store

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 find out which product features and benefits interest individual customers and focus on these when discussing products						
P1.2 describe and explain clearly and accurately relevant product features and benefits to customers						
P1.3 compare and contrast products in ways that help customers choose the product that best meets their needs						
P1.4 check customers' responses to your explanations, and confirm their interest in the product						
P1.5 encourage customers to ask you questions and respond to their questions and comments in ways that promote sales and goodwill						
P1.6 identify suitable opportunities to tell the customer about associated or additional products and do so in a way that promotes sales and goodwill						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 constantly check the store for security, safety and potential sales whilst helping customers						

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 give customers enough time to evaluate products and ask questions						
P2.2 handle customers' questions in a way that promotes sales and keeps the customer's confidence						
P2.3 identify the need for additional and associated products and take the opportunity to increase sales						
P2.4 clearly acknowledge the customer's buying decisions						
P2.5 clearly explain any customer rights that apply						
P2.6 when necessary, clearly explain to the customer where to pay for their purchases						

Additional evidence (if applicable):

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Unit 33: **Maximise product sales in a retail environment**

Unit code: C.04

Unit credit: 5

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
1. Identify opportunities to increase retail sales of particular products - you need to know and understand:		
K1.1 seasonal trends and how they affect opportunities for sales		
K1.2 the difference between the features and benefits of products		
K1.3 how you can promote the features and benefits of products to customers		
K1.4 how to estimate and compare the potential of promotional opportunities to increase sales		
K1.5 who to approach about promotional opportunities you have identified		
2. Promote particular retail products - you need to know and understand:		
K2.1 techniques for encouraging customers to buy the product being promoted		
K2.2 techniques for building customers' interest in regularly buying in future the product you are promoting		
K2.3 the information that is relevant in evaluating the success of promotions, and who needs this information		
K2.4 how to evaluate and record the results of promotions		

Additional evidence (if applicable):

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Element 1: Identify opportunities to increase retail sales of particular products

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 identify promotional opportunities and estimate their potential to increase sales						
P1.2 identify promotional opportunities which offer the greatest potential to increase sales						
P1.3 report promotional opportunities to the right person						
P1.4 fill in the relevant records fully and accurately						

Additional evidence (if applicable):

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

Element 2: Promote particular retail products

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 tell customers about promotions clearly and in a persuasive way						
P2.2 identify and take the most effective actions for converting promotional sales into regular future sales						
P2.3 gather relevant and accurate information about the effectiveness of promotions, and communicate this information clearly to the right person						
P2.4 record clearly and accurately the results of promotions						

Additional evidence (if applicable):

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Unit 34: Provide information and advice to customers in a retail environment

Unit code: C.05

Unit credit: 5

Unit level: 5

Introduction

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

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

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Provide information and advice to meet the needs of retail customers - you need to know and understand:</p> <p>K1.1 how to identify the customer's needs for information and advice</p> <p>K1.2 how to give clear and accurate information and check the customer understands you</p> <p>K1.3 sources of information about the products and services that the company offers to customers, including information about where products are from, what they consist of and whether they can be recycled after use</p> <p>K1.4 who to approach for help if you cannot provide information and advice yourself</p> <p>K1.5 why it is important to keep customer loyalty and confidence</p> <p>K1.6 how to maintain customer loyalty and confidence while dealing with requests for information and advice</p> <p>K1.7 company policy on customer service and how this applies to giving information and advice to customers</p>		
<p>2. Help retail customers sort out complaints - you need to know and understand:</p> <p>K2.1 how to manage angry customers</p> <p>K2.2 what your responsibility is for sorting out complaints</p> <p>K2.3 who to refer complaints to when you do not have the authority to sort them out</p> <p>K2.4 how to assess complaints and decide what action to take</p> <p>K2.5 your company's policy concerning returns</p>		

Knowledge	Type of evidence	Date
<p>2. Help retail customers sort out complaints - you need to know and understand:</p> <p>K2.6 why it is important to keep customer loyalty and confidence</p> <p>K2.7 how to keep customer loyalty and confidence when dealing with complaints</p> <p>K2.8 the legal rights and duties of the customer and the company</p> <p>K2.9 company policy on customer service and how this applies to dealing with complaints</p> <p>K2.10 company procedures for dealing with complaints</p>		

Additional evidence (if applicable):

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 acknowledge promptly and politely customers' requests for information and advice						
P1.2 identify the customer's needs for information and advice						
P1.3 communicate information and advice to customers in ways they can understand						
P1.4 provide information and advice to customers that is relevant, complete, accurate and up to date						
P1.5 check politely that the information and advice provided meets the customer's needs						
P1.6 find other ways to help the customer when the information and advice given is not satisfactory						
P1.7 refer requests for information or advice to the right person when you cannot help the customer						

Additional evidence (if applicable):

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Element 2: Help retail customers sort out complaints

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 identify the nature of the complaint from information obtained from customers						
P2.2 acknowledge the complaint clearly and accurately and apologise to the customer						
P2.3 follow legal requirements and company policies and procedures for dealing with complaints						
P2.4 when it is not your responsibility to sort out complaints, refer them promptly to the right person and explain the referral procedure clearly to the customer						

Additional evidence (if applicable):

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Unit 35: **Demonstrate products to customers in a retail environment**

Unit code: C.06

Unit credit: 3

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Demonstrate products to customers in a retail environment - you need to know and understand:</p> <p>K1.1 how demonstrations can help to promote and sell products</p> <p>K1.2 the safety precautions to take before, during and immediately after product demonstrations</p> <p>K1.3 how to obtain the equipment and products you need for demonstrations</p> <p>K1.4 the difference between 'features' and 'benefits' of products</p> <p>K1.5 the features and benefits of the products you are responsible for demonstrating</p> <p>K1.6 which product features and benefits can be demonstrated and which may need describing to the customer, in relation to the products you are responsible for demonstrating</p> <p>K1.7 why it is important to organise product demonstrations into logical steps and stages</p> <p>K1.8 how to organise product demonstrations into logical steps and stages</p> <p>K1.9 when and how to provide supporting commentary to help the customer understand the features and benefits of the product being demonstrated</p> <p>K1.10 why it is important to clear equipment and products away promptly and without keeping customers waiting unduly, after a demonstration is finished</p>		
<p>2. Help customers choose products in a retail store - you need to know and understand:</p> <p>K2.1 why you need to promote sales and goodwill, and how helping customers to choose products contributes to this</p> <p>K2.2 the products you are responsible for selling and their features and benefits</p>		

Knowledge	Type of evidence	Date
<p>2. Help customers choose products in a retail store - you need to know and understand:</p> <p>K2.3 why you need to explain product features and benefits to customers in ways that they understand and find interesting</p> <p>K2.4 how to check and interpret customers' responses to your explanations</p> <p>K2.5 how to adapt your explanations and respond to questions and comments in ways that promote sales and goodwill</p> <p>K2.6 how to encourage customers to ask you for clarification and more information</p> <p>K2.7 the risks of not paying attention to the store, in terms of security, safety and lost sales</p>		

Additional evidence (if applicable):

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Demonstrate products to customers in a retail environment

What you must do

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

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

Additional evidence (if applicable):

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Element 2: Help customers choose products in a retail store

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 find out which product features and benefits interest individual customers and focus on these when discussing products						
P2.2 describe and explain clearly and accurately relevant product features and benefits to customers						
P2.3 compare and contrast products in ways that help customers choose the product that best meets their needs						
P2.4 check customers' responses to your explanations, and confirm their interest in the product						
P2.5 encourage customers to ask you questions and respond to their questions and comments in ways that promote sales and goodwill						
P2.6 identify suitable opportunities to tell the customer about associated or additional products and do so in a way that promotes sales and goodwill						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.7 constantly check the store for security, safety and potential sales whilst helping customers						

Additional evidence (if applicable):

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Unit 36: **Process payments for purchases in a retail environment**

Unit code: C.08

Unit credit: 5

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Work out the price of customers' retail purchases - you need to know and understand:</p> <p>K1.1 how to identify and check prices in your own store</p> <p>K1.2 how to identify any current discounts and special offers</p> <p>K1.3 where to find information and advice on pricing</p> <p>K1.4 company procedures for working out payments</p> <p>K1.5 common methods of working out payments including point-of-sale technology, electronic calculators and longhand</p> <p>K1.6 the customer's rights and the company's duties and responsibilities in relation to the pricing of goods</p>		
<p>2. Provide service at point of sale in a retail store - you need to know and understand:</p> <p>K2.1 how to keep cash and other payments secure</p> <p>K2.2 the types of payment that you are authorised to receive</p> <p>K2.3 procedures for authorising non-cash transactions</p> <p>K2.4 how to check for and identify counterfeit payments</p> <p>K2.5 how to check for stolen cash equivalents</p> <p>K2.6 how to deal with customers offering suspect payments</p> <p>K2.7 relevant legal rights, duties and responsibilities</p> <p>K2.8 company procedures for taking payments</p> <p>K2.9 company procedures for dealing with suspected fraud</p>		

Additional evidence (if applicable):

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Element 1: Work out the price of customers' retail purchases

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 accurately identify the price of purchases						
P1.2 promptly sort out any pricing problems by referring to pricing information						
P1.3 get advice promptly from the right person when you cannot sort out pricing problems yourself						
P1.4 work out accurately the amount the customer should pay						

Additional evidence (if applicable):

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Element 2: Provide service at point of sale in a retail store

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 tell customers the correct amount to pay						
P2.2 check accurately the amount and means of payment offered by the customer						
P2.3 where the payment is acceptable, process the payment in line with company procedures						
P2.4 tell the customer tactfully when payment cannot be approved						
P2.5 offer additional services to the customer where these are available						
P2.6 treat customers politely throughout the payment process						
P2.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help						

Additional evidence (if applicable):

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Unit 37: **Process payments and credit applications for purchases in a retail environment**

Unit code: C.09

Unit credit: 7

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Work out the price of customers' retail purchases - you need to know and understand:</p> <p>K1.1 how to identify and check prices in your own store</p> <p>K1.2 how to identify any current discounts and special offers</p> <p>K1.3 where to find information and advice on pricing</p> <p>K1.4 company procedures for working out payments</p> <p>K1.5 common methods of working out payments including point-of-sale technology, electronic calculators and longhand</p> <p>K1.6 the customer's rights and the company's duties and responsibilities in relation to the pricing of goods</p>		
<p>2. Provide service at point of sale in a retail store - you need to know and understand:</p> <p>K2.1 how to keep cash and other payments secure</p> <p>K2.2 the types of payment that you are authorised to receive</p> <p>K2.3 procedures for authorising non-cash transactions</p> <p>K2.4 how to check for and identify counterfeit payments</p> <p>K2.5 how to check for stolen cash equivalents</p> <p>K2.6 how to deal with customers offering suspect payments</p> <p>K2.7 relevant legal rights, duties and responsibilities</p> <p>K2.8 company procedures for taking payments</p> <p>K2.9 company procedures for dealing with suspected fraud</p>		

Knowledge	Type of evidence	Date
3. Process applications from retail customers for credit facilities - you need to know and understand:		
K3.1 the features and conditions of the credit facilities offered by the company		
K3.2 legal and company requirements for giving information to customers when offering them credit facilities		
K3.3 legal and company procedures for carrying out credit checks and getting authorisation for credit facilities		
K3.4 who to approach for advice and help in sorting out difficulties in processing applications		

Additional evidence (if applicable):

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

Element 1: Work out the price of customers' retail purchases

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 accurately identify the price of purchases						
P1.2 promptly sort out any pricing problems by referring to pricing information						
P1.3 get advice promptly from the right person when you cannot sort out pricing problems yourself						
P1.4 work out accurately the amount the customer should pay						

Additional evidence (if applicable):

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Element 2: Provide service at point of sale in a retail store

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 tell customers the correct amount to pay						
P2.2 check accurately the amount and means of payment offered by the customer						
P2.3 where the payment is acceptable, process the payment in line with company procedures						
P2.4 tell the customer tactfully when payment cannot be approved						
P2.5 offer additional services to the customer where these are available						
P2.6 treat customers politely throughout the payment process						
P2.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help						

Additional evidence (if applicable):

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Element 3: Process applications from retail customers for credit facilities

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 identify the customer's needs for credit facilities						
P3.2 clearly explain to the customer the features and conditions of credit facilities						
P3.3 provide enough time and opportunities for the customer to ask for clarification or more information						
P3.4 accurately fill in the documents needed to allow the customer to get credit						
P3.5 successfully carry out the necessary credit checks and authorisation procedures						
P3.6 promptly refer difficulties in processing applications to the right person						

Additional evidence (if applicable):

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What you must know

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

Knowledge	Type of evidence	Date
<p>1. Process retail customer credit - you need to know and understand:</p> <p>K1.1 the risks to the company of offering credit to customers</p> <p>K1.2 how to see if a customer is suitable for credit</p> <p>K1.3 company guidelines for setting customer credit limits</p> <p>K1.4 how to check customer accounts effectively, including how to identify overdue payments and customers who have gone over their credit limits</p> <p>K1.5 company guidelines for managing customers who go over their credit limits</p> <p>K1.6 the legal rights and obligations of customers and retailers in relation to credit</p> <p>K1.7 company policies for crediting the cost of returned goods to customer accounts</p> <p>K1.8 the procedures carried out by the automated billing system</p>		
<p>2. Process payments made to retail customer accounts - you need to know and understand:</p> <p>K2.1 the acceptable ways for customers to make payments</p> <p>K2.2 how to process cash and non-cash payments</p> <p>K2.3 what counts as legal tender in your country</p> <p>K2.4 how to spot counterfeit payments</p> <p>K2.5 company procedures for storing cash and cash equivalents securely</p>		

Knowledge	Type of evidence	Date
<p>3. Reconcile retail customer accounts - you need to know and understand:</p> <p>K3.1 why accurate financial checks are needed</p> <p>K3.2 how to reconcile customer accounts accurately</p> <p>K3.3 the types of problem that you are responsible for sorting out, and how to identify and sort them out</p> <p>K3.4 who to approach for advice and help in sorting out problems that you cannot sort out or that are beyond your responsibility and control</p>		

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Element 1: Process retail customer credit

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 follow company guidelines for setting customer credit limits						
P1.2 check customer accounts accurately and at suitable intervals to check that payments are up to date						
P1.3 promptly investigate reasons for missed payments and accurately record your findings						
P1.4 identify customers who go over their credit limits and report your findings promptly to the right person						
P1.5 act promptly and within company guidelines to deal with customers who go over their credit limits						
P1.6 report to the right person the results of the action you take to deal with customers who go over their credit limits						

Additional evidence (if applicable):

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Element 2: Process payments made to retail customer accounts

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 check that payments from customers are valid and accurate						
P2.2 record payments from customers promptly and accurately						
P2.3 record clearly and accurately the reasons why payments are overdue						
P2.4 identify problems accurately and sort them out promptly						
P2.5 tell the right person promptly about any problems that you cannot sort out						
P2.6 store collected payments securely and in line with company procedures						

Additional evidence (if applicable):

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Element 3: Reconcile retail customer accounts

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 check that charges made to customer accounts are correct						
P3.2 check that credits made to customer accounts are correct						
P3.3 identify and sort out problems with customer accounts						
P3.4 tell the right person about problems with customer accounts that you cannot sort out or that are beyond your responsibility and control						

Additional evidence (if applicable):

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Unit 39:	Assemble retail products in customer's home/workplace
Unit code:	C.11
Unit credit:	4
Unit level:	5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Deliver retail products to the customer's premises - you need to know and understand:</p> <p>K1.1 how to check that you have all the products you are due to deliver</p> <p>K1.2 the equipment and paperwork you need to make deliveries and where to get these</p> <p>K1.3 what delivery details you need and where to get these</p> <p>K1.4 what sources of information to use for route planning, and how to use these</p> <p>K1.5 how an efficient delivery schedule benefits the business and the environment</p> <p>K1.6 how to plan a delivery schedule that makes the best use of time and other resources</p> <p>K1.7 how to check that you have enough fuel for your delivery schedule, and company procedures for getting more fuel if needed</p> <p>K1.8 how to transport products and equipment safely and securely</p> <p>K1.9 why it is important to deliver products at the times agreed with customers</p> <p>K1.10 the company procedures to follow if you expect to arrive at the customer's premises early or late</p> <p>K1.11 relevant legal restrictions on who can receive delivery</p> <p>K1.12 the company procedures to follow when no one is available who can receive the delivery and when the customer rejects the delivery</p> <p>K1.13 how to unload goods safely and in ways which protect goods from damage</p> <p>K1.14 why it is important to treat customers courteously, and how to do this</p> <p>K1.15 the records to keep of deliveries and non-deliveries and company procedures for completing these</p>		

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

Additional evidence (if applicable):

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Element 1: Deliver retail products to the customer's premises

What you must do

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

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

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

Additional evidence (if applicable):

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Element 2: Put retail products together at the customer's premises

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 identify the exact place where the customer wants the product to be put together, from information they provide						
P2.2 agree a suitable place for putting the product together if the customer's chosen place is not suitable						
P2.3 check accurately that all the basic features of the product are working properly						
P2.4 explain and demonstrate to the customer clearly and accurately how to use the product and its basic features						
P2.5 provide clear explanations if the customer needs more help in understanding how to use the product						
P2.6 tell the customer about any sources of information they can consult concerning the product						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.7 promote additional or associated products to the customer where appropriate						
P2.8 behave appropriately in the customer's premises and represent the company positively						

Additional evidence (if applicable):

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

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

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Internal verifier signature: _____ Date: _____

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

Unit 40:	Promote loyalty schemes to customers in a retail environment
Unit code:	C.12
Unit credit:	5
Unit level:	5

Introduction

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Explain to customers the features and benefits of the loyalty scheme - you need to know and understand:</p> <p>K1.1 the features and benefits of the company's loyalty scheme</p> <p>K1.2 the sources of information about the scheme that you can use or tell the customer about</p> <p>K1.3 why loyalty schemes are important in achieving the company's commercial aims</p> <p>K1.4 the specific offers currently available to scheme members</p> <p>K1.5 how to gain the customer's attention and interest</p> <p>K1.6 how to use suitable questions to gain information about the customer and their interest in joining the scheme</p> <p>K1.7 how to tell the customer about the features and benefits of the scheme</p> <p>K1.8 how to deal with frequently raised questions and objections in relation to the scheme</p>		
<p>2. Gain customer commitment to the loyalty scheme - you need to know and understand:</p> <p>K2.1 how to recognise signals that customers are interested in joining the loyalty scheme</p> <p>K2.2 how to ask customers to sign up for the scheme in a way that encourages them to co-operate willingly</p> <p>K2.3 the layout of the membership application form, the questions it asks, and how to fill in the form accurately</p> <p>K2.4 the proof of membership the company provides, and how to prepare this</p> <p>K2.5 how to correct or replace incorrect proof of membership</p>		

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Explain to customers the features and benefits of the loyalty scheme

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 take suitable opportunities to ask customers if they are members of the loyalty scheme and whether they are interested in joining						
P1.2 explain clearly and accurately to customers how joining the scheme would benefit them, including any current special offers relating to the scheme						
P1.3 respond positively to any questions or objections that the customer raises						
P1.4 provide relevant information to the customer to help them decide whether to join the scheme						
P1.5 treat the customer politely at all times and in a way that promotes goodwill						

Additional evidence (if applicable):

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Element 2: Gain customer commitment to the loyalty scheme

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 recognise accurately when customers are interested in joining the scheme						
P2.2 take opportunities to ask customers who are showing signs of interest to sign up for the scheme						
P2.3 fill in the membership application accurately with the customer, using the information they provide						
P2.4 give the customer proof of their membership						
P2.5 check with the customer that their details, as shown on the membership documentation, are correct						
P2.6 give application forms to customers who show interest but are not willing to join the scheme there and then						

Additional evidence (if applicable):

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Unit 41:	Provide the lingerie fitting service in a retail environment
Unit code:	C.17
Unit credit:	8
Unit level:	5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Identify the retail customer's needs for lingerie - you need to know and understand:</p> <p>K1.1 how to approach customers on the lingerie department</p> <p>K1.2 what is involved in the lingerie-fitting service and how long a fitting session is likely to take</p> <p>K1.3 questioning techniques used to clarify and agree customers' buying needs</p> <p>K1.4 how to build trust and relax customers you are working with</p> <p>K1.5 how to talk to different types of customers and help them to understand the information you provide</p>		
<p>2. Measure and fit the retail customer for lingerie - you need to know and understand:</p> <p>K2.1 basic styles, shapes and sizes of bra</p> <p>K2.2 the different parts of bras and their technical names</p> <p>K2.3 brands, colours, fabrics, trims and price range of available products</p> <p>K2.4 the size range and fit of the bras in stock and where you can find different types of bra</p> <p>K2.5 the features, advantages and benefits of different bras</p> <p>K2.6 the ordering service using in-house systems or brand catalogues for lines either not in stock or not carried by the store</p> <p>K2.7 solution dressing - what to wear under different outfits</p> <p>K2.8 accessories such as enhancers and co-ordinating garments</p> <p>K2.9 manufacturers' guidance on washing and caring for products</p>		

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

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

Additional evidence (if applicable):

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

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Internal verifier signature: _____ Date: _____

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

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

What you must do

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

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

Additional evidence (if applicable):

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Element 2: Measure and fit the retail customer for lingerie

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 create a rapport with the customer while assessing their fitting needs						
P2.2 clearly and tactfully explain to the customer that you cannot guarantee an accurate fit if measurements are taken on top of the customer's clothing						
P2.3 position yourself and the customer correctly so you can: <ul style="list-style-type: none"> take accurate measurements adjust the product to fit the customer allow the customer to see the product when worn and correctly fitted 						
P2.4 meet the customer's needs for privacy and help while they are trying products on						
P2.5 measure the chest accurately						

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

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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Unit 42: **Follow guidelines for planning and preparing visual merchandising displays**

Unit code: C.18

Unit credit: 7

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Interpret design briefs for retail display - you need to know and understand:</p> <p>K1.1 the role of displays in marketing, promotional and sales campaigns and activities</p> <p>K1.2 the importance and content of the design brief</p> <p>K1.3 how to use the design brief to identify what you need for the display</p> <p>K1.4 different approaches to designing displays for different types of merchandise, and why these are effective</p> <p>K1.5 how to evaluate the potential places to put the display so you meet the design brief</p> <p>K1.6 company policies for visual design</p>		
<p>2. Get hold of merchandise and props to be featured in retail displays - you need to know and understand:</p> <p>K2.1 the role of displays in marketing, promotional and sales campaigns and activities</p> <p>K2.2 how to use the design brief to identify what you need for the display</p> <p>K2.3 different approaches to designing displays for different types of merchandise, and why these are effective</p> <p>K2.4 how light, colour, texture, shape and dimension combine to achieve the effects you need</p> <p>K2.5 how to assess the potential of places to put displays to meet the design brief</p> <p>K2.6 company policies for visual design</p> <p>K2.7 the merchandiser or buyer that you need to consult about merchandise and props</p> <p>K2.8 how to arrange delivery of merchandise and monitor the progress of deliveries</p> <p>K2.9 why you must update stock records to account for merchandise on display, and how to do this</p>		

Additional evidence (if applicable):

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Element 1: Interpret design briefs for retail display

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 identify the purpose, content and style of the display						
P1.2 identify the equipment, materials, merchandise and props you need to create and install the display and the dates for completing it						
P1.3 evaluate whether the place you plan to put the display is likely to fulfil the design brief						
P1.4 create new and effective ways of improving the visual effect of displays, within the limits of the design brief, the company's visual design policies and the authority you have						

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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Unit 43: **Follow guidelines for dressing visual merchandising displays**

Unit code: C.19

Unit credit: 8

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Dress in-store displays to guidelines - you need to know and understand:</p> <p>K1.1 how to create and use focal points within a display</p> <p>K1.2 how to put together merchandising displays for use inside the store</p> <p>K1.3 how to choose and combine dimension, shape, colour, texture and lighting to create the visual effect you need from a display</p> <p>K1.4 how to dress mannequins, busts and other props</p> <p>K1.5 how to display different types of merchandise</p> <p>K1.6 how to choose a suitable type of grouping</p> <p>K1.7 how you can use different types, directions and levels of light to create atmosphere</p> <p>K1.8 how displays can achieve add-on sales and why this is important</p> <p>K1.9 why you are expected to install creative displays and to be aware of trends</p> <p>K1.10 different approaches to displaying merchandise and how to choose the best approach</p> <p>K1.11 the different purposes of displays and how they are used in visual merchandising</p> <p>K1.12 how props, prototypes, dressings and fixtures create visual effects</p> <p>K1.13 health and safety guidelines for displays</p> <p>K1.14 how to identify the selling features of merchandise to be used in displays</p>		

Knowledge	Type of evidence	Date
<p>2. Dress window displays to guidelines - you need to know and understand:</p> <p>K2.1 how to choose and combine dimension, shape, colour, texture and lighting to create the visual effect needed from a display</p> <p>K2.2 how to dress mannequins and other props</p> <p>K2.3 how to display different types of merchandise</p> <p>K2.4 how to choose a suitable way of grouping merchandise</p> <p>K2.5 how to light window displays and who in your store is responsible for installing lighting</p> <p>K2.6 how displays can achieve add-on sales and why this is important</p> <p>K2.7 why you are expected to install displays creatively and to be aware of trends</p> <p>K2.8 why different kinds of merchandise need different approaches to display, and what these approaches are</p> <p>K2.9 the different purposes of displays and how they are used in visual merchandising</p> <p>K2.10 how props, prototypes, dressings and fixtures create visual effects</p> <p>K2.11 the dressing techniques to use for different types of merchandise</p> <p>K2.12 health and safety guidelines for displays</p> <p>K2.13 the legal requirements which apply to pricing and ticketing</p> <p>K2.14 how to identify the selling features of merchandise to be used in displays</p>		

Knowledge	Type of evidence	Date
<p>3. Evaluate and improve retail displays - you need to know and understand:</p> <p>K3.1 how to decide if items are suitable for a display</p> <p>K3.2 how to identify risks to items and measures to protect them</p> <p>K3.3 how to evaluate the visual effect of displays</p> <p>K3.4 how to make adjustments and improvements to displays</p> <p>K3.5 how to use scale when creating visual effects</p> <p>K3.6 why you need to evaluate and improve displays</p> <p>K3.7 how light, colour, texture, shape and dimension combine to achieve the visual effects you need for a display</p> <p>K3.8 different approaches to using displays for different types of merchandise</p> <p>K3.9 the dressing techniques for different types of merchandise</p> <p>K3.10 how to identify the purpose of displays</p> <p>K3.11 the company's visual design and merchandising policies</p> <p>K3.12 the types of risk displays face, why you must reduce these risks as far as possible and how to do so</p> <p>K3.13 the reporting arrangements for sorting out problems and reducing risks</p> <p>K3.14 how much authority you have to change displays</p>		

Additional evidence (if applicable):

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

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

Element 1: Dress in-store displays to guidelines

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 follow company procedures for using ladders, tools and equipment safely						
P1.2 place displays where they will attract the attention of target customers						
P1.3 use the design brief to identify the focal points of the display						
P1.4 choose shapes, colours and groupings that are suited to the purpose and style of the display						
P1.5 create displays that achieve the visual effect you need and are consistent with the company's visual design policy						
P1.6 position merchandise, graphics and signs in ways that promote sales						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 check that lighting is installed in line with the design brief						
P1.8 check that the finished display meets health and safety guidelines and legal requirements						

Additional evidence (if applicable):

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Element 2: Dress window displays to guidelines

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 position merchandise, graphics and signs according to guidelines and in ways that attract the attention and interest of customers and give customers the information they need						
P2.2 group merchandise appropriately for the purpose and style of display, the selling features of the merchandise and the visual effect needed under the design brief						
P2.3 make sure that lighting is installed in line with lighting requirements						
P2.4 check that the finished display meets health and safety guidelines and legal requirements						

Additional evidence (if applicable):

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Element 3: Evaluate and improve retail displays

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 check that all the parts of the display are suitable for the purpose of the display and meet requirements						
P3.2 check that the display meets requirements for easy access, safety and security						
P3.3 identify safety and security risks to the display and choose suitable ways of reducing risks						
P3.4 consider how the display looks from all the directions from which customers will approach it						
P3.5 encourage colleagues to provide constructive comments about the display						
P3.6 promptly make any adjustments that you are authorised to make and that are needed to achieve the visual effect and to make the display safe and secure						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.7 regularly check the display's visual effect						
P3.8 promptly report to the right person any problems and risks that you are not responsible for sorting out yourself						

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Unit 44: **Order graphic materials for visual merchandising displays**

Unit code: C.20

Unit credit: 3

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Order graphic materials to meet retail display needs - you need to know and understand:</p> <p>K1.1 how graphic materials help to make displays more effective</p> <p>K1.2 different ways to use graphic materials for different types of merchandise</p> <p>K1.3 how to choose graphic materials that will achieve the desired effects</p> <p>K1.4 who can supply graphic materials</p> <p>K1.5 company procedures for ordering graphic materials</p> <p>K1.6 how to make clear to suppliers what graphic materials you need</p> <p>K1.7 how to check the quantity and quality of graphic materials when they are delivered</p> <p>K1.8 how to find out about cost limits and deadlines for buying graphic materials, and the importance of sticking to these</p>		
<p>2. Position graphic materials to support retail displays - you need to know and understand:</p> <p>K2.1 house style, company policy and legal requirements for using graphic materials</p> <p>K2.2 how to identify and interpret manufacturers' branding requirements</p> <p>K2.3 how to interpret the design brief</p> <p>K2.4 how to choose where to put graphic materials within the display</p> <p>K2.5 how to check that graphics and signs are safe and secure</p> <p>K2.6 how graphic materials help to attract and inform customers</p> <p>K2.7 different ways to use graphic materials for different types of merchandise</p>		

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

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

Element 1: Order graphic materials to meet retail display needs

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 make clear to suppliers what graphic materials you need						
P1.2 check that suppliers can meet your needs						
P1.3 order supplies of graphic materials promptly and within the available budget						
P1.4 check the progress of orders						
P1.5 check the quality and quantity of graphic materials when they are delivered						

Additional evidence (if applicable):

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Element 2: Position graphic materials to support retail displays

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 position graphic materials according to the design brief, house style, company policy on signs, manufacturers' branding requirements and legal requirements						
P2.2 position graphic materials in ways that support the display's intended visual effect and message						
P2.3 check that graphic materials are positioned safely and securely and in line with legal requirements						

Additional evidence (if applicable):

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Unit 45: **Dismantle and store visual merchandising displays**

Unit code: C.21

Unit credit: 13

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Dismantle retail displays - you need to know and understand:</p> <p>K1.1 how to dismantle displays safely</p> <p>K1.2 how to protect the parts of displays from being damaged during dismantling</p> <p>K1.3 how to identify unwanted materials and how to get rid of them safely</p> <p>K1.4 where to return the parts of display to</p> <p>K1.5 how to identify safe and approved cleaning materials and equipment to use</p> <p>K1.6 techniques for cleaning display sites and parts safely and thoroughly</p>		
<p>2. Store equipment, props and graphics for retail displays - you need to know and understand:</p> <p>K2.1 how to work out the storage space needed</p> <p>K2.2 how to identify requirements for protective packaging and security measures</p> <p>K2.3 how to check the condition of items</p> <p>K2.4 how to deal with items that need repair</p> <p>K2.5 why you must label items accurately</p> <p>K2.6 why you must keep records of items and where to store them</p> <p>K2.7 why you must store items securely</p> <p>K2.8 suitable storage facilities available to you</p> <p>K2.9 which items need to be stored</p>		

Knowledge	Type of evidence	Date
<p>2. Store equipment, props and graphics for retail displays - you need to know and understand:</p> <p>K2.10 possible dangers and risks to health, safety and security in relation to storage facilities and stored items</p> <p>K2.11 who to report dangers and risks to</p>		

Additional evidence (if applicable):

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Element 1: Dismantle retail displays

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 dismantle displays safely						
P1.2 protect the parts of the display from being damaged during dismantling						
P1.3 return the parts of the display to the appropriate places promptly and, if needed, in a saleable condition						
P1.4 get rid of unwanted materials safely and keep accurate records of this if needed						
P1.5 clean display sites and parts using safe and approved cleaning materials and equipment						

Additional evidence (if applicable):

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Element 2: Store equipment, props and graphics for retail displays

What you must do

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

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

Additional evidence (if applicable):

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Unit 46:	Make props for visual merchandising displays
Unit code:	C.22
Unit credit:	10
Unit level:	5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Confirm the requirements for props and prototypes for retail displays - you need to know and understand:</p> <p>K1.1 where to get the design brief</p> <p>K1.2 how to use design information to identify the props and prototypes you need</p> <p>K1.3 how to decide whether different types of props and prototypes are relevant, including life size, large scale, small scale, standing items and moving items</p> <p>K1.4 how to specify your needs for props and prototypes clearly, and what formats to use</p> <p>K1.5 how to use scale in creating visual effects</p> <p>K1.6 how props, prototypes, dressings and fixtures create visual effects</p> <p>K1.7 the types and styles of props and prototypes your company uses</p>		
<p>2. Make life-size copies of items for retail displays - you need to know and understand:</p> <p>K2.1 how to make the copies needed</p> <p>K2.2 how to check whether the copies you make are suitable for display</p> <p>K2.3 how to test that copies work as they should, look as they should, and are safe to use</p> <p>K2.4 how to use scale to create visual effects</p> <p>K2.5 how props, prototypes, dressings and fixtures create visual effects</p> <p>K2.6 how to use the design brief to identify what items need to be copied</p> <p>K2.7 how to identify the cost limits and deadlines for making copies</p> <p>K2.8 how to arrange suitable storage for copies</p>		

Knowledge	Type of evidence	Date
<p>3. Make scale models of items for retail displays - you need to know and understand:</p> <p>K3.1 how to create scale models to use as props and prototypes</p> <p>K3.2 how to evaluate finished models against specifications</p> <p>K3.3 how to test that scale models work as they should, look as they should, and are safe to use</p> <p>K3.4 how to use scale to create visual effects</p> <p>K3.5 how models help to create visual effects</p> <p>K3.6 the mechanical principles of working models</p> <p>K3.7 how to use the design brief to identify what you need for scale models</p> <p>K3.8 how to identify the budget and deadlines for making scale models</p> <p>K3.9 how to make suitable storage arrangements for scale models</p>		
<p>4. Decorate fixtures and panels for retail displays - you need to know and understand:</p> <p>K4.1 how to use scale to create visual effects</p> <p>K4.2 how to choose decorative materials and techniques</p> <p>K4.3 how to check and evaluate decorative work as it is being done</p> <p>K4.4 how to use materials efficiently</p> <p>K4.5 how to check the quality of finish of decorative panels and fixtures</p> <p>K4.6 how to judge the suitability of, and choose, new and creative decorative techniques</p> <p>K4.7 how to apply innovative decorative techniques</p> <p>K4.8 how to complete decorative work within cost limits and policy</p> <p>K4.9 how light, colour, texture, shape and dimension combine to achieve the visual effects you need for a display</p>		

Knowledge	Type of evidence	Date
<p>4. Decorate fixtures and panels for retail displays - you need to know and understand:</p> <p>K4.10 why you are expected to decorate panels and fixtures in creative ways</p> <p>K4.11 why different kinds of merchandise need different approaches to decoration</p> <p>K4.12 how decorated panels and fixtures contribute to visual effects</p> <p>K4.13 how to identify the range of decorative techniques and materials you can choose from</p> <p>K4.14 how to identify the purpose of the display</p> <p>K4.15 the company's visual design policy</p>		

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Element 1: Confirm the requirements for props and prototypes for retail displays

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 use design information to identify the props and prototypes you need						
P1.2 produce specifications for props and prototypes that meet the design brief						
P1.3 specify clearly and accurately the type, size and function of the props and prototypes you need						
P1.4 identify which props and prototypes you can get ready-made and which need to be made to order						
P1.5 make realistic plans to get all the items you need						

Additional evidence (if applicable):

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Element 2: Make life-size copies of items for retail displays

What you must do

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

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

Additional evidence (if applicable):

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Element 3: Make scale models of items for retail displays

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 choose new ideas, techniques and materials that are consistent with the design brief and the company's design policy						
P3.2 use shapes and colour styles that make models more effective within the limits of the design brief						
P3.3 choose and use suitable and efficient techniques, materials, tools and equipment for making scale models						
P3.4 complete scale models, including any alterations, by agreed deadlines and in line with the design brief						
P3.5 use valid and thorough tests to check that models work as they should, look as they should, and are safe to use						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.6 evaluate test results accurately and make any adjustments needed to the scale model						
P3.7 store scale models securely and make them available to those who need them by the agreed deadlines						

Additional evidence (if applicable):

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Element 4: Decorate fixtures and panels for retail displays

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P4.1 choose decorative techniques and materials which are suitable, new and within cost limits						
P4.2 choose materials that will have the visual effect you need when applied to the relevant fixtures						
P4.3 evaluate decorative work as its visual effect emerges and adjust it to give the effect you need						
P4.4 use tools, equipment and materials efficiently						
P4.5 produce decorative work that is free from faults, has the visual impact you need, is consistent with the design brief and is completed within agreed deadlines						

Additional evidence (if applicable):

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Unit 47:	Put visual merchandising displays together
Unit code:	C.23
Unit credit:	8
Unit level:	5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Interpret retail display layout requirements from plans, elevations and drawings - you need to know and understand:</p> <p>K1.1 how to identify the layout needed and the essential features of layouts from plans, elevations and drawings</p> <p>K1.2 how to work out what activities and resources you need to put layouts together</p> <p>K1.3 how to identify the health, safety and security arrangements needed for layouts</p> <p>K1.4 what layout design is and its part in effective visual design practice</p> <p>K1.5 the techniques of layout design, including drawing conventions and standards</p> <p>K1.6 sources of information to use when working out what you need for layouts</p> <p>K1.7 who can make decisions when you have problems with layouts</p>		
<p>2. Follow guidelines for putting retail display layouts together - you need to know and understand:</p> <p>K2.1 how to interpret guidelines for putting layouts together</p> <p>K2.2 how to spot opportunities to achieve creative effects</p> <p>K2.3 how to work creatively within the visual merchandising policy</p> <p>K2.4 how to spot and sort out problems when putting layouts together</p> <p>K2.5 when creative effects are suitable</p> <p>K2.6 the parts you need to put layouts together</p> <p>K2.7 the relevant health, safety and legal requirements</p> <p>K2.8 where to find the parts you need for layouts</p>		

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 accurately identify the essential features and detailed requirements of layouts from plans, elevations and drawings						
P1.2 accurately identify health, safety and security arrangements from plans, elevations and drawings						
P1.3 work out what activities and resources you need to put layouts together as shown in plans, elevations and drawings						
P1.4 identify possible problems in putting layouts together and work out ways of sorting them out						

Additional evidence (if applicable):

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Element 2: Follow guidelines for putting retail display layouts together

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 check that the parts you need are available and in working order						
P2.2 put the layout together within the guidelines, agreed deadlines, health and safety policies and legal requirements						
P2.3 identify opportunities for achieving creative effects and do so within the guidelines						
P2.4 identify possible problems which may arise and take prompt and suitable action within the guidelines						

Additional evidence (if applicable):

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Unit 48:	Promote beauty products to retail customers
Unit code:	C.35
Unit credit:	10
Unit level:	5

Introduction

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

What you must know

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

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

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

Additional evidence (if applicable):

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Element 1: Demonstrate beauty products to retail customers

What you must do

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

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

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

Additional evidence (if applicable):

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

What you must do

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

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

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

Additional evidence (if applicable):

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Unit 49: Follow point-of-sale procedures for age-restricted products in a retail environment

Unit code: C.36

Unit credit: 8

Unit level: 5

Introduction

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

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Follow procedures for retail sales of age-restricted products - you need to know and understand:</p> <p>K1.1 which age-restricted products you are authorised to sell</p> <p>K1.2 the age restrictions on the products you are authorised to sell, and what can happen to you and the company if you do not keep within these restrictions</p> <p>K1.3 company policies and procedures for asking for proof of age, including the types of proof you may accept</p> <p>K1.4 company policies and procedures for refusing sales of age-restricted products</p> <p>K1.5 why you should ask for proof of age and refuse sales in ways that are both firm and polite, and how to do so</p>		
<p>2. Provide service at point of sale in a retail store - you need to know and understand:</p> <p>K2.1 how to keep cash and other payments secure</p> <p>K2.2 the types of payment that you are authorised to receive</p> <p>K2.3 procedures for authorising non-cash transactions</p> <p>K2.4 how to check for and identify counterfeit payments</p> <p>K2.5 how to check for stolen cash equivalents</p> <p>K2.6 how to deal with customers offering suspect payments</p> <p>K2.7 relevant legal rights, duties and responsibilities</p> <p>K2.8 company procedures for taking payments</p> <p>K2.9 company procedures for dealing with suspected fraud</p>		

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Element 1: Follow procedures for retail sales of age-restricted products

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 follow legal requirements and company policies and procedures for asking for proof of age						
P1.2 when you need proof of the customer's age, make the sale only if they provide it and it meets legal and company conditions						
P1.3 follow legal requirements and company policies and procedures for refusing sales						
P1.4 refuse politely and firmly to make sales that are against the law or any procedures and policies you must follow						
P1.5 explain clearly and accurately to customers what proof of age you can accept						

Additional evidence (if applicable):

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Element 2: Provide service at point of sale in a retail store

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 tell customers the correct amount to pay						
P2.2 check accurately the amount and means of payment offered by the customer						
P2.3 where the payment is acceptable, process the payment in line with company procedures						
P2.4 tell the customer tactfully when payment cannot be approved						
P2.5 offer additional services to the customer where these are available						
P2.6 treat customers politely throughout the payment process						
P2.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help						

Additional evidence (if applicable):

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

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Unit 50: **Help customers to buy National Lottery products in a retail environment**

Unit code: C.37

Unit credit: 8

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Sell National Lottery products to retail customers - you need to know and understand:</p> <p>K1.1 the role of the operator in promoting the National Lottery</p> <p>K1.2 the role of the National Lottery Commission in monitoring how the National Lottery works</p> <p>K1.3 why there is concern about vulnerable players</p> <p>K1.4 your organisation's policies and procedures for selling, and refusing to sell, National Lottery products to vulnerable players</p> <p>K1.5 the main legal requirements relating to the National Lottery and gambling in general, and how these affect selling National Lottery products</p> <p>K1.6 the features of the National Lottery products currently available, including price, rules of play, methods of play and odds of winning</p> <p>K1.7 how to explain clearly to customers the features of National Lottery products</p> <p>K1.8 how to compare different National Lottery products for customers</p> <p>K1.9 the operator's policies and procedures for selling National Lottery products</p> <p>K1.10 the operator's requirements and your company's procedures for processing prize payouts</p> <p>K1.11 the purpose of the service terminal</p> <p>K1.12 how to use and maintain the service terminal</p> <p>K1.13 who to ask for help if the service terminal is not working properly</p>		

Knowledge	Type of evidence	Date
<p>2. Follow procedures for retail sales of age-restricted products - you need to know and understand:</p> <p>K2.1 which age-restricted products you are authorised to sell</p> <p>K2.2 the age restrictions on the products you are authorised to sell, and what can happen to you and the company if you do not keep within these restrictions</p> <p>K2.3 company policies and procedures for asking for proof of age, including the types of proof you may accept</p> <p>K2.4 company policies and procedures for refusing sales of age-restricted products</p> <p>K2.5 why you should ask for proof of age and refuse sales in ways that are both firm and polite, and how to do so</p>		
<p>3. Provide service at point of sale in a retail store - you need to know and understand:</p> <p>K3.1 how to keep cash and other payments secure</p> <p>K3.2 the types of payment that you are authorised to receive</p> <p>K3.3 procedures for authorising non-cash transactions</p> <p>K3.4 how to check for and identify counterfeit payments</p> <p>K3.5 how to check for stolen cash equivalents</p> <p>K3.6 how to deal with customers offering suspect payments</p> <p>K3.7 relevant legal rights, duties and responsibilities</p> <p>K3.8 company procedures for taking payments</p> <p>K3.9 company procedures for dealing with suspected fraud</p>		

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Sell National Lottery products to retail customers

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 use and maintain the service terminal in line with the operator's policies and procedures						
P1.2 keep to all relevant laws, regulations and organisational policies and procedures for selling National Lottery products to vulnerable players						
P1.3 explain the rules of the game clearly and accurately to customers, when they ask						
P1.4 explain clearly and accurately to customers how to play the game, when they ask						
P1.5 explain to customers clearly and accurately the differences between National Lottery products in terms of price, method of play and odds of winning						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 process prize payouts in line with the operator's requirements and your company's procedures						
P1.7 promptly ask the appropriate person for help when the service terminal is not working properly						

Additional evidence (if applicable):

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

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Internal verifier signature: _____ Date: _____

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

Element 2: Follow procedures for retail sales of age-restricted products

What you must do

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

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

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

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

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

What you must do

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

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

Additional evidence (if applicable):

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

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Internal verifier signature: _____ Date: _____

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Authorise and monitor the self-service dispensing of motor fuel on a forecourt - you need to know and understand:</p>		
<p>K1.1 the safety requirements laid down by the law and by your company for the safe dispensing of fuel by customers</p>		
<p>K1.2 the layout of your forecourt including the positions of the pumps</p>		
<p>K1.3 the age over which customers may legally dispense fuel, and legal and company requirements for checking that the customer is over the legal age</p>		
<p>K1.4 legal requirements concerning customers filling containers with fuel</p>		
<p>K1.5 the importance of remaining alert for safety hazards while customers are dispensing fuel; what hazards can arise; and how to deal with them</p>		
<p>K1.6 reasons why dispensing equipment might not work properly, and what action to take when this happens</p>		
<p>K1.7 the types of security risk which can arise when customers are dispensing fuel and how to remain alert for these</p>		
<p>K1.8 how to tell when a drive-off has occurred, and the company's procedures for recording and reporting drive-offs</p>		

Knowledge	Type of evidence	Date
<p>2. Provide service at point of sale in a retail store - you need to know and understand:</p> <p>K2.1 how to keep cash and other payments secure</p> <p>K2.2 the types of payment that you are authorised to receive</p> <p>K2.3 procedures for authorising non-cash transactions</p> <p>K2.4 how to check for and identify counterfeit payments</p> <p>K2.5 how to check for stolen cash equivalents</p> <p>K2.6 how to deal with customers offering suspect payments</p> <p>K2.7 relevant legal rights, duties and responsibilities</p> <p>K2.8 company procedures for taking payments</p> <p>K2.9 company procedures for dealing with suspected fraud</p>		

Additional evidence (if applicable):

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

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

What you must do

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 when the customer has finished dispensing fuel, transfer the transaction to point-of-sale promptly and in line with manufacturer's instructions						
P1.7 remain alert for security risks while customers are dispensing fuel						
P1.8 notice when customers have driven away without paying, and follow company procedures for recording and reporting drive-offs						

Additional evidence (if applicable):

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

Element 2: Provide service at point of sale in a retail store

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 tell customers the correct amount to pay						
P2.2 check accurately the amount and means of payment offered by the customer						
P2.3 where the payment is acceptable, process the payment in line with company procedures						
P2.4 tell the customer tactfully when payment cannot be approved						
P2.5 offer additional services to the customer where these are available						
P2.6 treat customers politely throughout the payment process						
P2.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help						

Additional evidence (if applicable):

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Unit 52: **Establish customer needs and provide advice regarding tiling products**

Unit code: C.40

Unit credit: 6

Unit level: 5

Introduction

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

What you must know

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

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

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

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

What you must do

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

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

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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Unit 53:	Advise customers upon measuring and planning for the fixing of tiles
Unit code:	C.41
Unit credit:	6
Unit level:	5

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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

What you must do

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

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

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

Additional evidence (if applicable):

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

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Unit 54: **Advise customers upon the fixing of tiles**

Unit code: C.42

Unit credit: 6

Unit level: 5

Introduction

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

What you must know

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

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

Knowledge	Type of evidence	Date
<p>1. Advise customers upon the fixing of tiles - you need to know and understand:</p> <p>K1.10 the principal types of tools and materials required for tile cutting and drilling, the respective purposes of these and how to use tools and materials safely including the use of tile cutters and tile nippers</p> <p>K1.11 how to cut and drill tiles safely and effectively and which tiles cannot be cut or drilled and why</p> <p>K1.12 methods and materials for fitting, fixing and sealing electrical underfloor heating systems</p> <p>K1.13 how to finish tiled surfaces off upon completion of tiling</p> <p>K1.14 the principal methods for undertaking routine cleaning and maintenance of all tiled surfaces including tiles and grouting, and how to recognise and deal with problems such as mildew, discolouration of tiles and grouting</p> <p>K1.15 the various cleaning and maintenance products available, the applications of these and how to use them safely</p>		

Additional evidence (if applicable):

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 1: Advise customers upon the fixing of tiles

What you must do

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

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.13 provide confidence to the customer that the decisions taken throughout the process will meet the customer's expectations and tiling requirements						

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 55: **Maintain a display of cut flowers in a retail store**

Unit code: C.43

Unit credit: 3

Unit level: 5

Introduction

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Maintain a display of cut flowers in a retail store - you need to know and understand:</p> <p>K1.1 the names of the cut flowers your store sells, and how to identify these flowers</p> <p>K1.2 the main reasons why customers buy cut flowers from your store, what they expect in terms of freshness and long life, and how the quality of the display affects sales</p> <p>K1.3 how to judge whether cut flowers are fresh enough for display, including how to recognise when flowers are in bud, blooming, overblown and decaying</p> <p>K1.4 why you need to remove flowers which are not fresh enough, including how they affect the condition of nearby flowers</p> <p>K1.5 when and how to check, tidy, and replenish the cut flower display and add water to the flowers as needed</p> <p>K1.6 how to handle cut flowers without damaging them</p> <p>K1.7 how to balance the need to tidy and replenish the display with the need to allow customers to view and choose flowers</p> <p>K1.8 how to safely and effectively clean up water spillages on or near the flower display</p> <p>K1.9 how to get rid of unsaleable flowers safely</p> <p>K1.10 how to respond to customer queries about cut flowers in ways that are polite and encourage sales</p> <p>K1.11 the likely life of cut flowers once the customer has bought them, and how customers can prolong the life of the cut flowers they buy in your store</p>		

Additional evidence (if applicable):

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COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 1: Maintain a display of cut flowers in a retail store

What you must do

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 respond to customers' queries about the flowers on display politely and in ways that are likely to encourage customers to buy flowers from your store						
P1.8 when customers ask, identify the flowers on display for them; help them find the flowers they want, if these are available; and advise on the likely life of the flowers and how to prolong the life of the flowers						

Additional evidence (if applicable):

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 56: Cash up in a retail store

Unit code: C.46

Unit credit: 2

Unit level: 5

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 1: Cash up in a retail store

What you must do

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

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

Additional evidence (if applicable):

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COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 57: **Promote the store’s credit card to customers**

Unit code: C.47

Unit credit: 3

Unit level: 5

Introduction

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

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Promote the store's credit card to customers - you need to know and understand:</p> <p>K1.1 the benefits to your store of having card holders</p> <p>K1.2 the opportunities you can take to ask customers if they are already card holders</p> <p>K1.3 friendly and engaging questioning techniques you can use to find out if customers are card holders</p> <p>K1.4 the benefits to the customer of having your store's credit card</p> <p>K1.5 how to explain to customers in a persuasive manner the benefits to them of being card holders</p> <p>K1.6 who is eligible to apply for the card</p> <p>K1.7 the features of your store's credit card including:</p> <ul style="list-style-type: none"> • the costs involved • the repayment terms • the customer's right to cancel the card <p>K1.8 typical concerns which customers might have about the card</p> <p>K1.9 how to respond to customers' concerns honestly whilst continuing to stress the benefits of the card</p> <p>K1.10 why it is important to the business to make existing card holders feel special and to continue to promote to them the benefits of the card</p>		

Additional evidence (if applicable):

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COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 take suitable opportunities and use effective questioning techniques to find out if customers have credit cards with your store						
P1.2 where customers aren't already card holders, tell them in a persuasive manner about the benefits to them of having the card						
P1.3 where customers are already card holders, acknowledge this and remind them in a friendly and persuasive manner of the benefits of using the card						
P1.4 where customers express an interest in having the card, give them clear and factually accurate information about the features of the card including: <ul style="list-style-type: none"> the costs involved the repayment terms the customer's right to cancel the card 						

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

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 58:	Provide service to customers in the dressing room of a retail store
Unit code:	C.48
Unit credit:	1
Unit level:	5

Introduction

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

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

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

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

What you must know

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

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

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

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

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

What you must do

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

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

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

Additional evidence (if applicable):

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	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 2: Keep dressing room facilities ready for customer use

What you must do

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

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

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

Additional evidence (if applicable):

	O = DIRECT OBSERVATION OF THE LEARNER'S PERFORMANCE BY THEIR ASSESSOR	PD = PROFESSIONAL DISCUSSION
COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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Countersigning assessor signature (if applicable): _____ Date: _____

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

Unit 59: **Promote sales of food or drink products by offering samples to customers**

Unit code: C.49

Unit credit: 2

Unit level: 5

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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	O = DIRECT OBSERVATION OF THE LEARNER'S PERFORMANCE BY THEIR ASSESSOR	PD = PROFESSIONAL DISCUSSION
COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

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

What you must do

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

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

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

Additional evidence (if applicable):

	O = DIRECT OBSERVATION OF THE LEARNER'S PERFORMANCE BY THEIR ASSESSOR	PD = PROFESSIONAL DISCUSSION
COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 60: **Deliver retail products to the customer's premises**

Unit code: C.50

Unit credit: 3

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Deliver retail products to the customer's premises - you need to know and understand:</p> <p>K1.1 how to check that you have all the products you are due to deliver</p> <p>K1.2 the equipment and paperwork you need to make deliveries and where to get these</p> <p>K1.3 what delivery details you need and where to get these</p> <p>K1.4 what sources of information to use for route planning, and how to use these</p> <p>K1.5 how an efficient delivery schedule benefits the business and the environment</p> <p>K1.6 how to plan a delivery schedule that makes the best use of time and other resources</p> <p>K1.7 how to check that you have enough fuel for your delivery schedule, and company procedures for getting more fuel if needed</p> <p>K1.8 how to transport products and equipment safely and securely</p> <p>K1.9 why it is important to deliver products at the times agreed with customers</p> <p>K1.10 the company procedures to follow if you expect to arrive at the customer's premises early or late</p> <p>K1.11 relevant legal restrictions on who can receive delivery</p> <p>K1.12 the company procedures to follow when no one is available who can receive the delivery and when the customer rejects the delivery</p> <p>K1.13 how to unload goods safely and in ways which protect goods from damage</p> <p>K1.14 why it is important to treat customers courteously, and how to do this</p> <p>K1.15 the records to keep of deliveries and non-deliveries and company procedures for completing these</p>		

Additional evidence (if applicable):

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	O = DIRECT OBSERVATION OF THE LEARNER'S PERFORMANCE BY THEIR ASSESSOR	PD = PROFESSIONAL DISCUSSION
COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 1: Deliver retail products to the customer's premises

What you must do

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

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

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

Additional evidence (if applicable):

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Unit 61: **Help customers to apply for the store's credit card and associated insurance products**

Unit code: C.52

Unit credit: 4

Unit level: 5

Introduction

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

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Offer customers insurance products associated with the store's credit card - you need to know and understand:</p> <p>K1.1 the difference between informing and advising customers about insurance products, and why you must give information and not advice</p> <p>K1.2 which insurance products you are authorised to offer, and to whom</p> <p>K1.3 product features which you must tell the customer about, including:</p> <ul style="list-style-type: none"> • whether or not the insurance is optional • the cost of the insurance • the cover available • significant and unusual exclusions • the customer's right to cancel the insurance <p>K1.4 how to give customers information about insurance products which is:</p> <ul style="list-style-type: none"> • consistent • clear • unbiased • factually correct • compliant with relevant legislation, regulations and guidelines <p>K1.5 the benefits to the customer of reading the policy summary</p> <p>K1.6 legal requirements for offering the customer the opportunity to read the policy summary</p> <p>K1.7 who is eligible for the insurance products you offer and how to check eligibility</p>		

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

Knowledge	Type of evidence	Date
<p>2. Help customers to apply for the store's credit card and associated insurance products - you need to know and understand:</p>		
<p>K2.1 the legal and company requirements for giving customers information about the application process</p> <p>K2.2 why customers may wish to take application forms away to study in detail and why this is to be welcomed</p> <p>K2.3 why you must void blank application forms and how to do so</p> <p>K2.4 why customers must prove their identity and what proofs you can accept</p> <p>K2.5 why you must keep customers' personal data secure during the application process and how to do this</p> <p>K2.6 the procedures agreed between the store and the insurer for processing applications</p> <p>K2.7 the procedures to follow when an application is accepted</p> <p>K2.8 how to treat customers with courtesy and tact when their applications have been declined</p> <p>K2.9 why you must not try to guess with customers about the possible reasons why their applications have been declined</p> <p>K2.10 the contact details you can give to customers who want to enquire further about declined applications</p> <p>K2.11 how to use the application system and equipment and how to deal with technical problems that may occur with these</p>		

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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Internal verifier signature: _____ Date: _____

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 use compliant wording to give credit card applicants consistent, clear, unbiased and factually correct information about the associated insurance products available, including: <ul style="list-style-type: none"> • whether or not the insurance is optional • the cost of the insurance • the cover available • significant and unusual exclusions • the customer's right to cancel the insurance 						
P1.2 offer customers the policy summary and explain clearly the benefits of reading it						
P1.3 allow customers enough time to read the policy summary if they wish						
P1.4 politely check that customers are eligible for the insurance products you are offering						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.5 in response to customers' requests for advice or recommendations, clearly and politely explain that you cannot answer these yourself and tell the customer who they can contact for further help						
P1.6 check that the customer understands the product information by listening carefully to what they say and observing their body language						

Additional evidence (if applicable):

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

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

What you must do

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 where an application is accepted, confirm clearly to the customer: <ul style="list-style-type: none"> • the decision • the customer's credit limit • the Annual Percentage Rate which applies 						
P2.7 follow procedures to enable accounts to be set up for customers whose applications have been accepted						
P2.8 where an application is declined, tell the customer tactfully and explain how they can enquire about the reasons						
P2.9 where technical problems occur with the application system or equipment, deal with these in line with procedures and report promptly to the right person any problems you can't resolve yourself						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 62: **Help customers to choose delicatessen products in a retail outlet**

Unit code: C.54

Unit credit: 6

Unit level: 5

Introduction

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

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Help customers to choose delicatessen products in a retail outlet - you need to know and understand:</p> <ul style="list-style-type: none"> K1.1 how to establish a rapport with customers K1.2 the kinds of questions you need to ask customers in order to find out their requirements K1.3 where to find reliable information about the products you are responsible for selling K1.4 effective ways of comparing and contrasting products for customers K1.5 how to recognise opportunities to recommend associated or additional products K1.6 practical limits on portion weight, size or shape K1.7 how to explain tactfully to customers when portion requirements cannot be met, and what alternatives can be offered 		

Additional evidence (if applicable):

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	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

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

What you must do

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

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

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

Additional evidence (if applicable):

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

Assessor signature: _____ Date: _____

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

Internal verifier signature: _____ Date: _____

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

Unit 63: Portion delicatessen products in a retail outlet to meet individual customers' requirements

Unit code: C.55

Unit credit: 6

Unit level: 5

Introduction

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

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

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

What you must know

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

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

Additional evidence (if applicable):

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COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 handle and portion products in ways which comply with all relevant food safety requirements						
P1.2 use tools and utensils suited to the product						
P1.3 cut products so as to: <ul style="list-style-type: none"> • produce conventionally acceptable portion shapes • maintain the attractiveness of the product • minimise waste • comply with all relevant health and safety requirements 						
P1.4 when weighing portions, take into account the weight of any additional items on the scales such as containers						
P1.5 check that the customer is satisfied with the portioned product before it is wrapped						

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

Additional evidence (if applicable):

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Unit 64: **Give customers a positive impression of yourself and your organisation**

Unit code: D.10

Unit credit: 5

Unit level: 5

Introduction

Excellent customer service is provided by people who are good with people. Your behaviour affects the impression that customers have of the service they are receiving. This unit is about communicating with your customers and giving a positive impression whenever you deal with a customer. By doing this you create a positive impression of your organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us and gives us good information. Every detail of your behaviour counts when dealing with a customer.

What you must know

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

Knowledge	Type of evidence	Date
<p>1. For the whole unit, you need to know and understand:</p> <p>K1.1 your organisation's standards for appearance and behaviour</p> <p>K1.2 your organisation's guidelines for how to recognise what your customer wants and respond appropriately</p> <p>K1.3 your organisation's rules and procedures regarding the methods of communication you use</p> <p>K1.4 how to recognise when a customer is angry or confused</p> <p>K1.5 your organisation's standards for timeliness in responding to customer questions and requests for information</p>		

Additional evidence (if applicable):

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Element 1: Establish rapport with customers

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 meet your organisation's standards of appearance and behaviour						
P1.2 greet your customer respectfully and in a friendly manner						
P1.3 communicate with your customer in a way that makes them feel valued and respected						
P1.4 identify and confirm your customer's expectations						
P1.5 treat your customer courteously and helpfully at all times						
P1.6 keep your customer informed and reassured						
P1.7 adapt your behaviour to respond to different customer behaviour						

Additional evidence (if applicable):

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Element 2: Respond appropriately to customers

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 respond promptly to a customer seeking help						
P2.2 choose the most appropriate way to communicate with your customer						
P2.3 check with your customer that you have fully understood their expectations						
P2.4 respond promptly and positively to your customer's questions and comments						
P2.5 allow your customer time to consider your response and give further explanation when appropriate						

Additional evidence (if applicable):

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Element 3: Communicate information to customers

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 quickly find information that will help your customer						
P3.2 give your customer information they need about the services or products offered by your organisation						
P3.3 recognise information that your customer might find complicated and check whether they fully understand						
P3.4 explain clearly to your customers any reasons why their expectations cannot be met						

Additional evidence (if applicable):

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Unit 65: **Support customer service improvements**

Unit code: D.11

Unit credit: 5

Unit level: 5

Introduction

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers. Your job involves delivering customer service. If your organisation has decided to make changes, it is your job to support them and to present them positively to your customers. Also, by listening to customer comments you may have your own ideas about how the service you deliver could be improved. This unit is about how you provide support for changes that your organisation has introduced. In addition, it covers how you present your own ideas for improvements to someone in your organisation whom can authorise trying out the change.

What you must know

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

Knowledge	Type of evidence	Date
1. For the whole unit, you need to know and understand: K1.1 how customer experience is influenced by the way service is delivered K1.2 how customer feedback is obtained K1.3 how to work with others to identify and support change in the way service is delivered K1.4 why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them		

Additional evidence (if applicable):

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

Element 1: Use feedback to identify potential customer service improvements

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 gather informal feedback from your customers						
P1.2 use your organisation's procedures to collect feedback from your customers						
P1.3 use the information from your customers to develop a better understanding of their customer service experience						
P1.4 identify ways the service you give could be improved based on information you have gathered						
P1.5 share your ideas for improving customer service with colleagues						

Additional evidence (if applicable):

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Element 2: Implement changes in customer service

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 identify a possible change that could be made to improve customer service						
P2.2 present your idea for improving customer service to a colleague with the appropriate authority to approve the change						
P2.3 carry out changes to customer service procedures based on your own idea or proposed by your organisation						
P2.4 keep your customers informed of changes to customer service						
P2.5 give customers a positive impression of changes that have been made						
P2.6 work positively with others to support customer service changes						

Additional evidence (if applicable):

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Element 3: Assist with the evaluation of changes in customer service

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 discuss with others how changes to customer service are working						
P3.2 work with others to identify any negative effects of changes and how these can be avoided						

Additional evidence (if applicable):

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Unit 66: **Resolve customer service problems**

Unit code: D.12

Unit credit: 6

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
1. For the whole unit, you need to know and understand: K1.1 organisational procedures and systems for dealing with customer service problems K1.2 how to defuse potentially stressful situations K1.3 how to negotiate K1.4 the limitations of what you can offer your customer K1.5 types of action that may make a customer problem worse and should be avoided		

Additional evidence (if applicable):

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Element 1: Spot customer service problems

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 listen carefully to your customers about any problem they have raised						
P1.2 ask your customers about the problem to check your understanding						
P1.3 recognise repeated problems and alert the appropriate authority						
P1.4 share customer feedback with others to identify potential problems before they happen						
P1.5 identify problems with systems and procedures before they begin to affect your customers						

Additional evidence (if applicable):

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Element 2: Pick the best solution to resolve customer service problems

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 identify the options for resolving a customer service problem						
P2.2 work with others to identify and confirm the options to resolve a customer service problem						
P2.3 work out the advantages and disadvantages of each option for your customer and your organisation						
P2.4 pick the best option for your customer and your organisation						
P2.5 identify for your customer other ways that problems may be resolved if you are unable to help						

Additional evidence (if applicable):

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Element 3: Take action to resolve customer service problems

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 discuss and agree the options for solving the problem with your customer						
P3.2 take action to implement the option agreed with your customer						
P3.3 work with others and your customer to make sure that any promises related to solving the problem are kept						
P3.4 keep your customer fully informed about what is happening to resolve the problem						
P3.5 check with your customer to make sure the problem has been resolved to their satisfaction						
P3.6 give clear reasons to your customer when the problem has not been resolved to their satisfaction						

Additional evidence (if applicable):

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Unit 67: **Help to maintain health and safety in a retail environment**

Unit code: E.06

Unit credit: 4

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Deal with accidents and emergencies in a retail environment - you need to know and understand:</p> <p>K1.1 company procedures and legal requirements for dealing with accidents and emergencies</p> <p>K1.2 how speaking and behaving in a calm way helps to promote safety during emergency situations</p> <p>K1.3 techniques for speaking and behaving in a calm way while dealing with accidents and emergencies</p> <p>K1.4 how reporting accidents and emergencies promotes health and safety</p> <p>K1.5 legal and company requirements for reporting accidents and emergencies</p> <p>K1.6 company procedures for evacuation, including how the alarm is raised and where emergency exits and assembly points are</p>		
<p>2. Help to reduce risks to health and safety in a retail environment - you need to know and understand:</p> <p>K2.1 the health and safety requirements laid down by your company and by law</p> <p>K2.2 how setting a good example can contribute to health and safety in the workplace</p> <p>K2.3 the limits of your authority and responsibility for dealing with health and safety risks, and the importance of not taking on more responsibility than you are authorised to</p> <p>K2.4 approved procedures for dealing with health and safety risks</p> <p>K2.5 who to report health and safety risks to</p> <p>K2.6 what can happen to you and to others if you do not use equipment and materials in line with the manufacturer's instructions</p> <p>K2.7 where to find instructions for using equipment and materials</p>		

Additional evidence (if applicable):

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COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
	P = PRODUCTS OF THE LEARNER'S WORK	WT = AUTHENTIC STATEMENTS/WITNESS TESTIMONY
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	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 1: Deal with accidents and emergencies in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 follow company procedures and legal requirements for dealing with accidents and emergencies						
P1.2 speak and behave in a calm way while dealing with accidents and emergencies						
P1.3 report accidents and emergencies promptly, accurately and to the right person						
P1.4 recognise when evacuation procedures have been started and following company procedures for evacuation						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 follow the health and safety requirements laid down by your company and by law, and encourage colleagues to do the same						
P2.2 promptly take the approved action to deal with risks if you are authorised to do so						
P2.3 if you do not have authority to deal with risks, report them promptly to the right person						
P2.4 use equipment and materials in line with the manufacturer's instructions						

Additional evidence (if applicable):

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

Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 68: **Help to keep the retail unit secure**

Unit code: E.07

Unit credit: 6

Unit level: 5

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Help to keep the retail environment secure - you need to know and understand:</p> <p>K1.1 the types of security risk that can arise in your workplace</p> <p>K1.2 how much authority and responsibility you have to deal with security risks, including your legal rights and duties</p> <p>K1.3 company policy and procedures for dealing with security risks in your workplace</p> <p>K1.4 who to report security risks to, and how to contact them</p> <p>K1.5 the approved procedures and techniques for protecting your personal safety when security risks arise</p> <p>K1.6 company policies and procedures for maintaining security while you work</p> <p>K1.7 company policies and procedures for making sure that security will be maintained when you go on your breaks and when you finish work</p>		

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

Element 1: Help to keep the retail environment secure

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 take prompt and suitable action to reduce security risks as far as possible, where it is within the limits of your responsibility and authority to do so						
P1.2 follow company policy and legal requirements when dealing with security risks						
P1.3 recognise when security risks are beyond your authority and responsibility to sort out, and report these risks promptly to the right person						
P1.4 use approved procedures and techniques for protecting your personal safety when security risks arise						
P1.5 follow company policies and procedures for maintaining security while you work						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 follow company policies and procedures for making sure that security will be maintained when you go on your breaks and when you finish work						

Additional evidence (if applicable):

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COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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Assessor signature: _____ Date: _____

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

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

Unit 69:	Allocate and check work in your team
Unit code:	E.16
Unit credit:	12
Unit level:	5

Introduction

This unit is about ensuring that the work required of your team is effectively and fairly allocated amongst team members. It also involves checking on the progress and quality of the work of team members to ensure that the required level or standard of performance is being met.

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

What you must know

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

Knowledge	Type of evidence	Date
<p>For the whole unit, you need to know and understand:</p> <p>General knowledge and understanding</p> <p>K1.1 different ways of communicating effectively with members of a team</p> <p>K1.2 the importance of confirming/clarifying the work required of the team with your manager and how to do this effectively</p> <p>K1.3 how to plan the work of a team, including how to identify any priorities or critical activities and the available resources</p> <p>K1.4 how to identify sustainable resources and ensure their effective use when planning the work of a team</p> <p>K1.5 how to identify and take due account of health and safety issues in the planning, allocation and checking of work</p> <p>K1.6 why it is important to allocate work across the team on a fair basis and how to do so</p> <p>K1.7 why it is important to brief team members on the work they have been allocated and the standard or level of expected performance and how to do so</p> <p>K1.8 the values, ethics, beliefs, faith, cultural conventions, perceptions and expectations of any team members from a different country or culture and how your own values, ethics, beliefs, faith, cultural conventions, perceptions, expectations, use of language, tone of voice and body language may appear to them</p> <p>K1.9 ways of encouraging team members to ask questions and/or seek clarification and make suggestions in relation to the work which they have been allocated</p>		

Knowledge	Type of evidence	Date
<p>For the whole unit, you need to know and understand:</p>		
<p>General knowledge and understanding</p> <p>K1.10 effective ways of regularly and fairly checking the progress and quality of the work of team members</p> <p>K1.11 how to provide prompt and constructive feedback to team members</p> <p>K1.12 how to select and apply a limited range of different methods for motivating, supporting and encouraging team members to complete the work they have been allocated and improve their performance, and for recognising their achievements</p> <p>K1.13 the additional support and/or resources which team members might require to help them complete their work and how to assist in providing this</p> <p>K1.14 why it is important to monitor the team for conflict and how to identify the cause(s) of conflict when it occurs and deal with it promptly and effectively</p> <p>K1.15 how to take account of diversity and inclusion issues when supporting and encouraging team members to complete the work they have been allocated</p> <p>K1.16 why it is important to identify unacceptable or poor performance by members of the team and how to discuss the cause(s) and agree ways of improving performance with team members</p> <p>K1.17 the type of problems and unforeseen events that may occur and how to support team members in dealing with them</p> <p>K1.18 how to log information on the ongoing performance of team members and use this information for performance appraisal purposes</p> <p>Industry/sector specific knowledge and understanding</p> <p>K1.19 industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work</p> <p>K1.20 industry/sector requirements for the development or maintenance of knowledge, understanding and skills</p>		

Knowledge	Type of evidence	Date
For the whole unit, you need to know and understand:		
Context-specific knowledge and understanding		
K1.21 the members, purpose and objectives of your team		
K1.22 the work required of your team		
K1.23 the available resources for undertaking the required work		
K1.24 the organisation's written health and safety policy statement and associated information and requirements		
K1.25 your team's plan for undertaking the required work		
K1.26 the skills, knowledge and understanding, experience and workloads of team members		
K1.27 your organisation's policy and procedures in terms of personal development		
K1.28 reporting lines in the organisation and the limits of your authority		
K1.29 organisational standards or levels of expected performance		
K1.30 organisational policies and procedures for dealing with poor performance		
K1.31 organisational grievance and disciplinary policies and procedures		
K1.32 organisational performance appraisal systems		

Additional evidence (if applicable):

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Allocate and check work in your team

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 confirm the work required of the team with your manager and seek clarification, where necessary, on any outstanding points and issues						
P1.2 plan how the team will undertake its work, identifying any priorities or critical activities and making best use of the available resources						
P1.3 allocate work to team members on a fair basis taking account of their skills, knowledge and understanding, experience and workloads and the opportunity for development						
P1.4 brief team members on the work they have been allocated and the standard or level of expected performance						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.5 recognise and seek to find out about differences in expectations and working methods of any team members from a different country or culture and promote ways of working that take account of their expectations and maximise productivity						
P1.6 encourage team members to ask questions, make suggestions and seek clarification in relation to the work they have been allocated						
P1.7 check the progress and quality of the work of team members on a regular and fair basis against the standard or level of expected performance and provide prompt and constructive feedback						
P1.8 support team members in identifying and dealing with problems and unforeseen events						
P1.9 motivate team members to complete the work they have been allocated and provide, where requested and where possible, any additional support and/or resources to help completion						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.10 monitor the team for conflict, identifying the cause(s) when it occurs and dealing with it promptly and effectively						
P1.11 identify unacceptable or poor performance, discuss the cause(s) and agree ways of improving performance						
P1.12 recognise successful completion of significant pieces of work or work activities by team members and the overall team and advise your manager						
P1.13 use information collected on the performance of team members in any formal appraisal of performance						

Additional evidence (if applicable):

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

Element 2: Behaviours which underpin effective performance

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 make time available to support others						
P2.2 clearly agree what is expected of others and hold them to account						
P2.3 prioritise objectives and plan work to make best use of time and resources						
P2.4 state your own position and views clearly and confidently in conflict situations						
P2.5 show integrity, fairness and consistency in decision-making						
P2.6 seek to understand people's needs and motivations						
P2.7 take pride in delivering high quality work						
P2.8 take personal responsibility for making things happen						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.9 encourage and support others to make the best use of their abilities						
P2.10 be vigilant for possible risks and hazards						

Additional evidence (if applicable):

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Unit 70: **Prepare newspapers and magazines for return to the merchandiser**

Unit code: E.20

Unit credit: 2

Unit level: 5

Introduction

This unit is about your role in ensuring that unsold newspapers and magazines are returned to the merchandiser so that your store can receive the credit owed for unsold items. You need to pick out returns using the information you are given, and follow procedures for preparing returns and putting them in the right place ready for collection at the agreed time. You also need to complete the necessary paperwork, and deal with missed returns and returns which aren't collected.

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Prepare newspapers and magazines for return to the merchandiser - you need to know and understand:</p> <p>K1.1 why it is important to return unsold newspapers and magazines promptly and in line with procedures</p> <p>K1.2 the agreed collection times for returns</p> <p>K1.3 how to organise your work so that you prepare returns for collection by the agreed times</p> <p>K1.4 what information you need to enable you to prepare returns, where to get this information and how to interpret it</p> <p>K1.5 the required order for stacking returns</p> <p>K1.6 the materials and methods to use for wrapping returns securely and with minimum waste</p> <p>K1.7 the information which needs to appear on labels for returns</p> <p>K1.8 how to lift and move returns safely</p> <p>K1.9 where to put returns ready for collection</p> <p>K1.10 the returns paperwork you need to complete and how to complete it</p> <p>K1.11 where to file returns paperwork</p> <p>K1.12 company procedures for dealing with missed returns and returns which aren't collected</p>		

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Prepare newspapers and magazines for return to the merchandiser

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 allow enough time to prepare returns by the agreed collection time						
P1.2 use the information you are given to pick out those items which need returning						
P1.3 stack returns in the required order						
P1.4 wrap returns using methods which protect items adequately and minimise wastage of wrapping materials						
P1.5 label returns clearly with all the required information						
P1.6 lift and move returns safely						
P1.7 put returns in the agreed place ready for collection						
P1.8 complete returns paperwork legibly and with all the required information						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.9 file returns paperwork in the right place						
P1.10 follow company procedures for dealing with missed returns and returns which aren't collected						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 71:	Check the accuracy of records of hours worked in a retail store
Unit code:	E.22
Unit credit:	3
Unit level:	5

Introduction

This unit is about your responsibility for checking the accuracy of records of hours worked by colleagues in your store. Colleagues must receive the pay that is due to them, and your role is to help to ensure that this happens. You do this firstly by checking the records of hours worked and noticing and querying anything unusual or which seems to be incorrect. You then process the data, check it carefully in case mistakes have been made during processing, and then pass the data on to those who need it. You also need to respond to colleagues' queries, remembering always to treat colleagues as internal 'customers', and to respect confidentiality.

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Check the accuracy of records of hours worked in a retail store - you need to know and understand:</p> <p>K1.1 why you need to check records of hours worked</p> <p>K1.2 the records the company keeps of hours worked, and where to find these</p> <p>K1.3 efficient and effective methods for checking data and calculations</p> <p>K1.4 the discrepancies and unusual features you need to check for, and how to recognise these</p> <p>K1.5 why it is important to spot recurring data inaccuracies, how to do this and who needs to know about such problems</p> <p>K1.6 what information and reports you need to produce, when and how to produce them and who needs to see them</p> <p>K1.7 what it means to treat colleagues as internal 'customers' and why it is important to do this</p> <p>K1.8 the types of query you are responsible for resolving and how to resolve these</p> <p>K1.9 who to refer queries to when you cannot resolve these yourself</p> <p>K1.10 why it is important to keep personal data confidential, and the company procedures for doing this</p> <p>K1.11 what data processing equipment and materials to use and how to do so safely, effectively and efficiently</p>		

Additional evidence (if applicable):

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

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Internal verifier signature: _____ Date: _____

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

Element 1: Check the accuracy of records of hours worked in a retail store

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 use efficient and effective methods of checking that data and calculations are complete and accurate						
P1.2 spot discrepancies and unusual features of data and query these promptly with the right people						
P1.3 spot recurring data inaccuracies and report these promptly to the right people						
P1.4 give information and reports to the right people at the required times and in suitable formats						
P1.5 provide information and advice promptly, courteously and accurately in response to colleagues' queries about records of hours worked						
P1.6 where you cannot resolve colleagues' queries, refer these promptly to the right person						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 follow company procedures for keeping personal data confidential						
P1.8 use data processing equipment and materials safely, effectively and efficiently						

Additional evidence (if applicable):

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

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

Candidate signature: _____ Date: _____

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

Assessor signature: _____ Date: _____

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

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

Internal verifier signature: _____ Date: _____

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

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