

Candidate Logbook

SVQ

SVQ2 in Retail Skills at SCQF Level 5

December 2011



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Publications code SV030006

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Contents

Section 1: SVQ2 in Retail Skills at SCQF Level 5	1
Introduction	1
National Occupational Standards and SVQs	1
Which SVQs in Retail Skills/Retail are available?	1
Who is this SVQ for?	2
What progression opportunity does this SVQ offer me?	2
What is the structure of the SVQ2 in Retail Skills at SCQF Level 5?	3
Section 2: Examples of forms	11
Collecting your evidence	11
Example form 1 – Portfolio title page	13
Example form 2 – Personal profile	15
Example form 3 – Contents checklist	17
Example form 4 – Index of evidence	19
Example form 5 – Unit assessment plan	21
Example form 6 – Unit sign-off record	23
Example form 7 – Work Log	25
Example form 8 – Observation record	27
Example form 9 – Witness testimony	29
Example form 10 – Expert witness evidence record	31
Example form 11 – Record of questions and candidate’s answers	33
Section 3: Logbook	35
Mandatory units	39
Unit 1: Work effectively in your retail team	41
Optional units	53
Unit 2: Help customers choose products in a retail environment	55
Unit 3: Maximise product sales in a retail environment	67
Unit 4: Provide information and advice to customers in a retail environment	77
Unit 5: Demonstrate products to customers in a retail environment	89
Unit 6: Promote loyalty schemes to customers in a retail environment	101

Unit 7:	Promote the store's credit card to customers	113
Unit 8:	Help customers to apply for the store's credit card and associated insurance products	121
Unit 9:	Receive goods and materials into storage in a retail environment	135
Unit 10:	Put goods and materials into storage in a retail environment	147
Unit 11:	Process customer orders for goods in a retail environment	157
Unit 12:	Pick products in a retail store to fulfil customer orders	169
Unit 13:	Check stock levels and sort out problems with stock levels in a retail store	177
Unit 14:	Prepare newspapers and magazines for return to the merchandiser	185
Unit 15:	Provide the lingerie fitting service in a retail environment	193
Unit 16:	Provide service to customers in the dressing room of a retail store	209
Unit 17:	Process bake-off products for sale in a retail environment	223
Unit 18:	Process greengrocery products for sale in a retail environment	235
Unit 19:	Finish meat products by hand in a retail environment	249
Unit 20:	Maintain food safety while working with food in a retail environment	263
Unit 21:	Hand-process fish in a retail environment	273
Unit 22:	Contribute to the control and efficiency of dough production in a retail environment	281
Unit 23:	Select, weigh and measure bakery ingredients	291
Unit 24:	Hand divide, mould and shape fermented doughs	305
Unit 25:	Promote sales of food or drink products by offering samples to customers	317
Unit 26:	Help customers to choose delicatessen products in a retail outlet	325
Unit 27:	Portion delicatessen products in a retail outlet to meet individual customers' requirements	333
Unit 28:	Establish customer needs and provide advice regarding tiling products	341
Unit 29:	Advise customers upon measuring and planning for the fixing of tiles	349
Unit 30:	Advise customers upon the fixing of tiles	357
Unit 31:	Receive driver-controlled deliveries of fuel on a petrol forecourt	367
Unit 32:	Control deliveries of motor fuel on a forecourt	379

Unit 33:	Process the self-service dispensing and purchase of motor fuel on a forecourt	393
Unit 34:	Prepare products for sale to customers in a retail environment	407
Unit 35:	Assemble retail products in customer's home/workplace	415
Unit 36:	Promote beauty products to retail customers	429
Unit 37:	Help customers to buy National Lottery products in a retail environment	443
Unit 38:	Maintain a display of cut flowers in a retail store	459
Unit 39:	Deliver retail products to the customer's premises	467
Unit 40:	Keep stock on sale at required levels in a retail environment	475
Unit 41:	Display stock to promote sales to customers in a retail environment	487
Unit 42:	Follow guidelines for planning and preparing visual merchandising displays	501
Unit 43:	Follow guidelines for dressing visual merchandising displays	511
Unit 44:	Order graphic materials for visual merchandising displays	529
Unit 45:	Dismantle and store visual merchandising displays	539
Unit 46:	Make props for visual merchandising displays	549
Unit 47:	Put visual merchandising displays together	571
Unit 48:	Allocate and check work in your team	581
Unit 49:	Process payments for purchases in a retail environment	597
Unit 50:	Process payments and credit applications for purchases in a retail environment	609
Unit 51:	Process cash and credit transactions in a retail environment	625
Unit 52:	Follow point-of-sale procedures for age-restricted products in a retail environment	639
Unit 53:	Cash up in a retail store	649
Unit 54:	Check the accuracy of records of hours worked in a retail store	657
Unit 55:	Process returned goods and materials in a retail environment	665
Unit 56:	Give customers a positive impression of yourself and your organisation	677
Unit 57:	Support customer service improvements	691
Unit 58:	Resolve customer service problems	705
Unit 59:	Help to maintain health and safety in a retail environment	719
Unit 60:	Help to keep the retail unit secure	729
Unit 61:	Process donated goods for resale or recycling in a retail environment	737

Unit 62:	Contribute to food safety in a retail environment	745
Unit 63:	Load orders for despatch from a retail store to customers	755
Unit 64:	Contribute to monitoring and maintaining ease of shopping in a retail sales area	763
Unit 65:	Provide a counter/takeaway service	771
Unit 66:	Process part-exchange sales transactions in a retail environment	781
Unit 67:	Develop individual retail service opportunities	795
Unit 68:	Provide a personalised sales and after-sales service to your retail clients	807
Unit 69:	Help customers to choose specialist products in a retail environment	819
Unit 70:	Demonstrate specialist products to customers in a retail environment	829
Unit 71:	Organise the receipt and storage of goods in a retail environment	837
Unit 72:	Audit stock levels and stock inventories in a retail environment	853
Unit 73:	Monitor and help improve food safety in a retail environment	867
Unit 74:	Help customers to choose alcoholic beverages in a retail store	879
Unit 75:	Assist customers to obtain appropriate insurance	887
Unit 76:	Source required goods and services in a retail environment	911
Unit 77:	Maintain the availability of goods for sale to customers in a retail environment	923
Unit 78:	Help to manage a retail team	939
Unit 79:	Contribute to the continuous improvement of retail operations	949
Unit 80:	Plan, monitor and adjust staffing levels and schedules in a retail environment	963
Unit 81:	Recruit, select and keep colleagues	975
Unit 82:	Develop productive working relationships with colleagues	987
Unit 83:	Provide learning opportunities for colleagues	1001
Unit 84:	Enable customers to apply for credit and hire purchase facilities	1017
Unit 85:	Evaluate the receipt of payments from customers	1033
Unit 86:	Monitor and support secure till use during trading hours	1045
Unit 87:	Monitor and evaluate the quality of service provided to your customers by external suppliers	1053
Unit 88:	Organise the delivery of reliable customer service	1065

Unit 89:	Improve the customer relationship	1079
Unit 90:	Work with others to improve customer service	1093
Unit 91:	Monitor and solve customer service problems	1107
Unit 92:	Promote continuous improvement	1121
Unit 93:	Help to monitor and maintain the security of the retail unit	1135
Unit 94:	Monitor and maintain health and safety in a retail environment	1145
Unit 95:	Choose merchandise to feature in visual merchandising displays	1159
Unit 96:	Plan, monitor and control how graphics are used in visual merchandising displays	1171
Unit 97:	Monitor the effect of visual merchandising displays and layouts	1187
Unit 98:	Allocate, monitor and control visual merchandising project resources against budgets	1199
Unit 99:	Contribute to developing and putting into practice the company's visual merchandising policy	1211
Unit 100:	Create plans, elevations and drawings to realise visual merchandising ideas	1225

Section 1: SVQ2 in Retail Skills at SCQF Level 5

Introduction

This document contains information specific to the SVQ2 in Retail Skills at SCQF Level 5.

National Occupational Standards and SVQs

The standards, Assessment Strategy and qualification structure for the SVQ2 in Retail Skills at SCQF Level 5 are owned by Skillsmart Retail, who reviewed these National Occupational Standards. The SVQs have been developed from the National Occupational Standards.

The SVQ2 in Retail Skills at SCQF Level 5 gives recognition of candidates' skills, knowledge and understanding. It enables candidates to gain a qualification in the workplace that relates to their job and promotes good working practice.

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

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93 Newman Street
Londo, W1T 3EZ

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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 are available as follows:

- Edexcel SVQ1 in Retail Skills at SCQF Level 4
- Edexcel SVQ2 in Retail Skills at SCQF Level 5
- Edexcel SVQ3 in Retail (Sales Professional) at SCQF Level 6
- Edexcel SVQ3 in Retail (Visual Merchandising) at SCQF Level 6
- Edexcel 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 SVQ2 in Retail Skills at SCQF Level 5

The Edexcel SVQ2 in Retail Skills at SCQF Level 5 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:

- general sales assistants
- product experts

What progression opportunity does this SVQ offer me?

Candidates may progress within their own employment from supporting a team of people to a supervisory role. They can also progress to:

- other level 2 qualifications, such as the Edexcel BTEC Level 2 Award, Certificate and Diploma in Retail Knowledge (QCF), the Edexcel BTEC Level 2 Certificate in Retail Knowledge (Beauty) (QCF) and the Edexcel BTEC Level 2 Award in Team Leading (QCF)
- the Edexcel BTEC Level 3 Award, Certificate and Diploma in Retail Knowledge (QCF)
- the SVQ3 in Retail (Sales Professional), Retail (Visual Merchandising) and Retail (Management) at SCQF Level 6
- the SVQ3 in Management at SCQF Level 7
- the Edexcel BTEC Level 3 Award and Certificate in Management (QCF)
- the Edexcel BTEC Level 3 Diploma and Extended Diploma in Business (Management) (QCF).

What is the structure of the SVQ2 in Retail Skills at SCQF Level 5?

To achieve the whole qualification at Level 5, candidates must prove competence in six units.

This comprises:

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

Mandatory unit for the Edexcel SVQ2 in Retail Skills at SCQF Level 5

You must achieve the unit listed below:

Unit number	Unit code	Title	Unit credit	SCQF level
1	E.19	Work effectively in your retail team	8	5

Optional units for the SVQ2 in Retail Skills at SCQF Level 5

You must achieve:

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

Group A - Sales

Unit number	Unit code	Title	Unit credit	SCQF level
2	C.03	Help customers choose products in a retail environment	8	5
3	C.04	Maximise product sales in a retail environment	5	5
4	C.05	Provide information and advice to customers in a retail environment	5	5
5	C.06	Demonstrate products to customers in a retail environment	3	5
6	C.12	Promote loyalty schemes to customers in a retail environment	5	5
7	C.47	Promote the store's credit card to customers	3	5
8	C.52	Help customers to apply for the store's credit card and associated insurance products	4	5

Group B - Stock management

Unit number	Unit code	Title	Unit credit	SCQF level
9	B.03	Receive goods and materials into storage in a retail environment	4	5
10	B.04	Put goods and materials into storage in a retail environment	4	5
11	B.06	Process customer orders for goods in a retail environment	3	5
12	B.28	Pick products in a retail store to fulfil customer orders	4	5
13	B.30	Check stock levels and sort out problems with stock levels in a retail store	2	5
14	E.20	Prepare newspapers and magazines for return to the merchandiser	2	5

Group C - Product expertise

Unit number	Unit code	Title	Unit credit	SCQF level
<i>Clothing and footwear</i>				
15	C.17	Provide the lingerie fitting service in a retail environment	8	5
16	C.48	Provide service to customers in the dressing room of a retail store	1	5
<i>Food and drink</i>				
17	B.10	Process bake-off products for sale in a retail environment	6	5
18	B.12	Process greengrocery products for sale in a retail environment	9	5
19	B.13	Finish meat products by hand in a retail environment	9	5
20	B.21	Maintain food safely while working with food in a retail environment	8	5
21	B.31	Hand-process fish in a retail environment	8	5
22	B.32	Contribute to the control and efficiency of dough production in a retail environment	4	5
23	B.33	Select weigh and measure bakery ingredients	6	5
24	B.34	Hand divide, mould and shape fermented doughs	6	5
25	C.49	Promote sales of food or drink products by offering samples to customers	2	5

Unit number	Unit code	Title	Unit credit	SCQF level
26	C.54	Help customers to choose delicatessen products in a retail outlet	6	5
27	C.55	Portion delicatessen products in a retail outlet to meet individual customers' requirements	6	5
<i>Home and garden</i>				
28	C.40	Establish customer needs and provide advice regarding tiling products	6	5
29	C.41	Advise customers upon measuring and planning for the fixing of tiles	6	5
30	C.42	Advise customers upon the fixing of tiles	6	5
<i>Motor fuel</i>				
31	B.23	Receive driver-controlled deliveries of fuel on a petrol forecourt	7	5
32	B.24	Control deliveries of motor fuel on a forecourt	7	5
33	C.39	Process the self-service dispensing and purchase of motor fuel on a forecourt	7	5
<i>Other</i>				
34	B.09	Prepare products for sale to customers in a retail environment	3	5
35	C.11	Assemble retail products in customer's home/workplace	4	5
36	C.35	Promote beauty products to retail customers	10	5
37	C.37	Help customers to buy national lottery products in a retail environment	8	5
38	C.43	Maintain a display of cut flowers in a retail store	3	5
39	C.50	Deliver retail products to the customer's premises	3	5

Group D - Merchandising

Unit number	Unit code	Title	Unit credit	SCQF level
40	B.05	Keep stock on sale at required levels in a retail environment	3	5

Group E - Visual merchandising

Unit number	Unit code	Title	Unit credit	SCQF level
41	C.02	Display stock to promote sales to customers in a retail environment	6	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

Group F - Management and leadership

Unit number	Unit code	Title	Unit credit	SCQF level
48	E.16	Allocate and check work in your team	12	5

Group G - Finance and administration

Unit number	Unit code	Title	Unit credit	SCQF level
49	C.08	Process payments for purchases in a retail environment	5	5
50	C.09	Process payments and credit applications for purchases in a retail environment	7	5
51	C.10	Process cash and credit transactions in a retail environment	7	5
52	C.36	Follow point-of-sale procedures for age-restricted products in a retail environment	8	5
53	C.46	Cash up in a retail store	2	5
54	E.22	Check the accuracy of records of hours worked in a retail store	3	5

Group H - Customer service

Unit number	Unit code	Title	Unit credit	SCQF level
55	B.07	Process returned goods and materials in a retail environment	3	5
56	D.10*	Give customers a positive impression of yourself and your organisation	5	5
57	D.11*	Support customer service improvements	5	5
58	D.12*	Resolve customer service problems	6	5

**Only one unit can count towards the qualification when chosen from units D.10, D.11 and D.12, the SCQF Level 6 units D.13, D.14, D.15, D.16 and the SCQF Level 7 unit D.17.*

Group I - Organisational effectiveness

Unit number	Unit code	Title	Unit credit	SCQF level
59	E.06	Help to maintain health and safety in a retail environment	4	5
60	E.07	Help to keep the retail unit secure	6	5

A maximum of one unit can be chosen from **either Group J - SCQF level 4, or Group K - SCQF Level 6 and above**. The candidate is **not** allowed to choose units from both SCQF Level 4 and SCQF Level 6 or above.

Group J - Optional at SCQF Level 4 units

Unit number	Unit code	Title	Unit credit	SCQF level
61	B.08	Process donated goods for resale or recycling in a retail environment	6	4
62	B.20	Contribute to food safety in a retail environment	7	4
63	B.29	Load orders for despatch from a retail store to customers	3	4
64	C.51	Contribute to monitoring and maintaining ease of shopping in a retail sales area	2	4
65	C.58	Provide a counter/takeaway service	3	4

Group K - Optional at SCQF Level 6 and above units

Unit number	Unit code	Title	Unit credit	SCQF level
Sales				
66	C.07	Process part-exchange sales transactions in a retail environment	12	6
67	C.30	Develop individual retail service opportunities	6	6
68	C.31	Provide a personalised sales and after-sales service to your retail clients	8	6
69	C.56	Help customers choose specialist products in a retail environment	7	6
70	C.57	Demonstrate specialist products to customers in a retail environment	5	6
Stock management				
71	B.14	Organise the receipt and storage of goods in a retail environment	11	7
72	B.15	Audit stock levels and stock inventories in a retail environment	6	7
Product expertise				
<i>Food and drink</i>				
73	B.22	Monitor and help improve food safety in a retail environment	12	6
74	C.45	Help customers to choose alcoholic beverages in a retail store	6	6
<i>Other</i>				
75	C.38	Assist customers to obtain appropriate insurance	12	6
Sourcing				
76	B.16	Source required goods and services in a retail environment	10	7
Merchandising				
77	C.13	Maintain the availability of goods for sale to customers in a retail environment	11	6
Management and leadership				
78	E.09	Help to manage a retail team	11	6
79	E.10	Contribute to the continuous improvement of retail operations	10	6
80	E.12	Plan, monitor and adjust staffing levels and schedules in a retail environment	11	7
81	E.13	Recruit, select and keep colleagues	12	9

Group K - Optional at SCQF level 6 and above units (*continued ...*)

Unit number	Unit code	Title	Unit credit	SCQF level
82	E.15	Develop productive working relationships with colleagues	9	6
Developing people				
83	E.14	Provide learning opportunities for colleagues	11	8
Finance and administration				
84	C.15	Enable customers to apply for credit and hire purchase facilities	12	6
85	C.16	Evaluate the receipt of payments from customers	9	6
86	E.21	Monitor and support secure till use during trading hours	3	6
Customer service				
87	E.17	Monitor and evaluate the quality of service provided to your customers by external suppliers	9	6
88	D.13*	Organise the delivery of reliable customer service	6	6
89	D.14*	Improve the customer relationship	7	6
90	D.15*	Work with others to improve customer service	8	6
91	D.16*	Monitor and solve customer service problems	6	6
92	D.17 *	Promote continuous improvement	7	7
*Only one unit can count towards the qualification from the SCQF Level 6 units D.13, D.14, D.15, D.16 the SCQF Level 5 units D.10, D.11 and D.12 and the SCQF Level 7 unit D.17.				
Organisational effectiveness				
93	E.11	Help to monitor and maintain the security of the retail unit	11	6
94	E.18	Monitor and maintain health and safety in a retail environment	13	6
Visual merchandising				
95	C.24	Choose merchandise to feature in visual merchandising displays	6	6
96	C.25	Plan, monitor and control how graphics are used in visual merchandising displays	8	6
97	C.26	Monitor the effect of visual merchandising displays and layouts	10	6

Unit number	Unit code	Title	Unit credit	SCQF level
98	C.27	Allocate, monitor and control visual merchandising project resources against budgets	10	6
99	C.28	Contribute to developing and putting into practice the company's visual merchandising policy	10	6
100	C.29	Create plans, elevations and drawings to realise visual merchandising ideas	10	6

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 SVQ2 in **Retail Skills** at SCQF Level 5.

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

	Page number
Mandatory units	39
Unit 1: Work effectively in your retail team	41
Optional units	53
Unit 2: Help customers choose products in a retail environment	55
Unit 3: Maximise product sales in a retail environment	67
Unit 4: Provide information and advice to customers in a retail environment	77
Unit 5: Demonstrate products to customers in a retail environment	89
Unit 6: Promote loyalty schemes to customers in a retail environment	101
Unit 7: Promote the store's credit card to customers	113
Unit 8: Help customers to apply for the store's credit card and associated insurance products	121
Unit 9: Receive goods and materials into storage in a retail environment	135
Unit 10: Put goods and materials into storage in a retail environment	147
Unit 11: Process customer orders for goods in a retail environment	157
Unit 12: Pick products in a retail store to fulfil customer orders	169
Unit 13: Check stock levels and sort out problems with stock levels in a retail store	177
Unit 14: Prepare newspapers and magazines for return to the merchandiser	185
Unit 15: Provide the lingerie fitting service in a retail environment	193
Unit 16: Provide service to customers in the dressing room of a retail store	209
Unit 17: Process bake-off products for sale in a retail environment	223
Unit 18: Process greengrocery products for sale in a retail environment	235
Unit 19: Finish meat products by hand in a retail environment	249
Unit 20: Maintain food safety while working with food in a retail environment	263
Unit 21: Hand-process fish in a retail environment	273
Unit 22: Contribute to the control and efficiency of dough production in a retail environment	281

Unit 23:	Select, weigh and measure bakery ingredients	291
Unit 24:	Hand divide, mould and shape fermented doughs	305
Unit 25:	Promote sales of food or drink products by offering samples to customers	317
Unit 26:	Help customers to choose delicatessen products in a retail outlet	325
Unit 27:	Portion delicatessen products in a retail outlet to meet individual customers' requirements	333
Unit 28:	Establish customer needs and provide advice regarding tiling products	341
Unit 29:	Advise customers upon measuring and planning for the fixing of tiles	349
Unit 30:	Advise customers upon the fixing of tiles	357
Unit 31:	Receive driver-controlled deliveries of fuel on a petrol forecourt	367
Unit 32:	Control deliveries of motor fuel on a forecourt	379
Unit 33:	Process the self-service dispensing and purchase of motor fuel on a forecourt	393
Unit 34:	Prepare products for sale to customers in a retail environment	407
Unit 35:	Assemble retail products in customer's home/workplace	415
Unit 36:	Promote beauty products to retail customers	429
Unit 37:	Help customers to buy National Lottery products in a retail environment	443
Unit 38:	Maintain a display of cut flowers in a retail store	459
Unit 39:	Deliver retail products to the customer's premises	467
Unit 40:	Keep stock on sale at required levels in a retail environment	475
Unit 41:	Display stock to promote sales to customers in a retail environment	487
Unit 42:	Follow guidelines for planning and preparing visual merchandising displays	501
Unit 43:	Follow guidelines for dressing visual merchandising displays	511
Unit 44:	Order graphic materials for visual merchandising displays	529
Unit 45:	Dismantle and store visual merchandising displays	539
Unit 46:	Make props for visual merchandising displays	549
Unit 47:	Put visual merchandising displays together	571
Unit 48:	Allocate and check work in your team	581

Unit 49:	Process payments for purchases in a retail environment	597
Unit 50:	Process payments and credit applications for purchases in a retail environment	609
Unit 51:	Process cash and credit transactions in a retail environment	625
Unit 52:	Follow point-of-sale procedures for age-restricted products in a retail environment	639
Unit 53:	Cash up in a retail store	649
Unit 54:	Check the accuracy of records of hours worked in a retail store	657
Unit 55:	Process returned goods and materials in a retail environment	665
Unit 56:	Give customers a positive impression of yourself and your organisation	677
Unit 57:	Support customer service improvements	691
Unit 58:	Resolve customer service problems	705
Unit 59:	Help to maintain health and safety in a retail environment	719
Unit 60:	Help to keep the retail unit secure	729
Unit 61:	Process donated goods for resale or recycling in a retail environment	737
Unit 62:	Contribute to food safety in a retail environment	745
Unit 63:	Load orders for despatch from a retail store to customers	755
Unit 64:	Contribute to monitoring and maintaining ease of shopping in a retail sales area	763
Unit 65:	Provide a counter/takeaway service	771
Unit 66:	Process part-exchange sales transactions in a retail environment	781
Unit 67:	Develop individual retail service opportunities	795
Unit 68:	Provide a personalised sales and after-sales service to your retail clients	807
Unit 69:	Help customers to choose specialist products in a retail environment	819
Unit 70:	Demonstrate specialist products to customers in a retail environment	829
Unit 71:	Organise the receipt and storage of goods in a retail environment	837
Unit 72:	Audit stock levels and stock inventories in a retail environment	853
Unit 73:	Monitor and help improve food safety in a retail environment	867
Unit 74:	Help customers to choose alcoholic beverages in a retail store	879

Unit 75:	Assist customers to obtain appropriate insurance	887
Unit 76:	Source required goods and services in a retail environment	911
Unit 77:	Maintain the availability of goods for sale to customers in a retail environment	923
Unit 78:	Help to manage a retail team	939
Unit 79:	Contribute to the continuous improvement of retail operations	949
Unit 80:	Plan, monitor and adjust staffing levels and schedules in a retail environment	963
Unit 81:	Recruit, select and keep colleagues	975
Unit 82:	Develop productive working relationships with colleagues	987
Unit 83:	Provide learning opportunities for colleagues	1001
Unit 84:	Enable customers to apply for credit and hire purchase facilities	1017
Unit 85:	Evaluate the receipt of payments from customers	1033
Unit 86:	Monitor and support secure till use during trading hours	1045
Unit 87:	Monitor and evaluate the quality of service provided to your customers by external suppliers	1053
Unit 88:	Organise the delivery of reliable customer service	1065
Unit 89:	Improve the customer relationship	1079
Unit 90:	Work with others to improve customer service	1093
Unit 91:	Monitor and solve customer service problems	1107
Unit 92:	Promote continuous improvement	1121
Unit 93:	Help to monitor and maintain the security of the retail unit	1135
Unit 94:	Monitor and maintain health and safety in a retail environment	1145
Unit 95:	Choose merchandise to feature in visual merchandising displays	1159
Unit 96:	Plan, monitor and control how graphics are used in visual merchandising displays	1171
Unit 97:	Monitor the effect of visual merchandising displays and layouts	1187
Unit 98:	Allocate, monitor and control visual merchandising project resources against budgets	1199
Unit 99:	Contribute to developing and putting into practice the company's visual merchandising policy	1211
Unit 100:	Create plans, elevations and drawings to realise visual merchandising ideas	1225

Mandatory units

Unit 1: **Work effectively in your retail team**

Unit code: E.19

Unit credit: 8

Unit level: 5

Introduction

For the purposes of this unit, the ‘team’ could be just you and your manager. This unit is about two aspects of being an effective team member. The first is about working with colleagues to achieve results together. It is about managing your time effectively and getting along with colleagues in the workplace. 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 follow your training programme and work out by trial and error which ways of learning and remembering tend to work best 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. Work effectively in your 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 how to ask for help in ways that make your needs clear while respecting the other person's needs and priorities</p> <p>K1.4 why you should offer help to colleagues and respond positively to requests for help, whenever possible</p> <p>K1.5 why you need to balance being helpful to colleagues with completing your own work</p> <p>K1.6 how to refuse requests for help, when necessary, in ways that show respect for the other person and maintain good working relationships</p> <p>K1.7 how to let colleagues know when their behaviour is bothering you, in ways that encourage constructive discussion</p> <p>K1.8 how to encourage constructive discussion when colleagues are upset with you</p> <p>K1.9 who to approach for advice and help if you are experiencing difficulties working with colleagues</p> <p>K1.10 how the law and your organisation define discrimination, bullying and harassment</p> <p>K1.11 company procedures for dealing with discrimination, bullying and harassment</p> <p>K1.12 why you must always follow instructions for safeguarding health and safety as you work</p>		

Knowledge	Type of evidence	Date
<p>2. Improve the way you learn in a retail environment - 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 ways of learning and remembering information, tasks and procedures</p> <p>K2.6 which ways of learning and remembering tend to work best for you</p> <p>K2.7 why you should ask for help with any problems you have with your training, and who to ask</p> <p>K2.8 why you should ask for feedback on your progress</p> <p>K2.9 the most useful times to ask for feedback on your progress, and how to ask for it</p> <p>K2.10 how to respond positively to feedback and use it to help you improve</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: Work effectively in your 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 offer help to colleagues when your workload allows and without taking on more responsibility than you are authorised to do						
P1.4 discuss and sort out difficulties in working together in a polite and constructive way						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
P1.5 ask a suitable person for advice about any problems in working with colleagues that you can't resolve yourself						
P1.6 follow instructions for safeguarding health and safety as you work						

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Element 2: Improve the way you learn in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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 learning plan						
P2.3 ask the right person for advice if you are not clear about anything in your training programme						
P2.4 use suitable methods to help you understand and remember the information, tasks and procedures you need to learn						
P2.5 promptly ask the right people for help when you are having problems following your training programme						
P2.6 ask at suitable times for feedback about your progress and make sure you clearly understand what is going well and what needs improving						

Additional evidence (if applicable):

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Optional units

Unit 2: **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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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
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						
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 3: **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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Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

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

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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Internal verifier signature: _____ Date: _____

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 4: 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>		

Knowledge	Type of evidence	Date
<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> <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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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 5: 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>		

Knowledge	Type of evidence	Date
<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> <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 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						

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

Additional evidence (if applicable):

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Unit 6:	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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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
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 7: 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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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
P1.5 where customers express concern about the card, address their concerns honestly whilst continuing to stress the benefits of the card						

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Unit 8: **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>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> <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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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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Assessor signature: _____ Date: _____

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

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Element 2: Help customers to apply for the store's credit card and associated insurance products

What you must do

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 where an application is accepted, confirm clearly to the customer: <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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Countersigning assessor signature (if applicable): _____ Date: _____

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Unit 9: 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>		

Knowledge	Type of evidence	Date
<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> <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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Assessor signature: _____ Date: _____

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

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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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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 10: **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: _____

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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: 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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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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Unit 11:	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> <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>		

Knowledge	Type of evidence	Date
K2.7 what might happen if customer information is not kept confidential K2.8 company procedures for storing customer information securely K2.9 who is entitled to see customer information, and in what situations		

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: 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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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.5 tell the right person promptly when you cannot process an order and explain the reasons clearly						
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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Assessor signature: _____ Date: _____

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

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

Unit 12:	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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Candidate signature: _____ Date: _____

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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 prices						

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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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: _____

Unit 13: **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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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 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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Assessor signature: _____ Date: _____

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

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

Unit 14: **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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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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Countersigning assessor signature (if applicable): _____ Date: _____

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Unit 15:	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> <p>K2.10 scheduled delivery dates for new products</p> <p>K2.11 trends in design, technological solutions and fabrics</p>		

Knowledge	Type of evidence	Date
<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>		
<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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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.5 measure the chest accurately						
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 16:	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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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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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 shopfloor						
P2.7 follow company procedures for dealing with merchandise that is no longer of saleable quality						

Additional evidence (if applicable):

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Unit 17: **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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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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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 follow company procedures for re-using and recycling waste materials						

Additional evidence (if applicable):

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Unit 18: 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>		

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

Additional evidence (if applicable):

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

What you must do

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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 19: **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						

Additional evidence (if applicable):

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

What you must do

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

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

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Unit 20: 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
<p>To meet the national standard you must:</p> <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 						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<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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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 21: **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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Assessor signature: _____ 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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Unit 22: **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 pastes, 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>		
<p>2. Contribute to improving the efficiency and effectiveness of dough processing in a retail store - you need to know and understand:</p> <p>K2.1 why constant improvement to dough processing is necessary in both the short and long term</p> <p>K2.2 company procedures for making constructive suggestions for improvements to dough processing</p> <p>K2.3 how to spot ways in which dough processing could realistically be improved</p> <p>K2.4 how to explain your suggestions positively and in enough detail for further action to be agreed</p> <p>K2.5 how to react positively to feedback</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: 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 23: **Select, weigh and measure bakery ingredients**

Unit code: B.33

Unit credit: 6

Unit level: 5

Introduction

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Knowledge and understanding which relates to the whole of this unit - you need to know and understand:</p> <p>K1.1 to what standards of health and safety and food safety you are required to work, why it is important that you do so and what might happen if they are not met</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 standard 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> <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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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: 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 24: Hand divide, mould and shape fermented doughs

Unit code: B.34

Unit credit: 6

Unit level: 5

Introduction

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Knowledge and understanding which relates to the whole of this unit - you need to know and understand:</p> <p>K1.1 to what standards of health and safety and food safety you are required to work, why it is important that you do so, and what might happen if they are not met</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
<p>K.12 how to maintain dough condition and deal with time constraints and variations to conditions throughout processing</p> <p>K.13 the correct method for loading and unloading trays in racks</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 divide fermented dough

What you must do

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

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

Additional evidence (if applicable):

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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: Hand mould and shape fermented dough

What you must do

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

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

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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 explain clearly to customers, when necessary, where they can buy the products sampled						
P1.8 monitor the freshness of samples on display and remove samples which no longer meet requirements for freshness						
P1.9 dispose of waste products in line with company and legal food safety requirements						
P1.10 follow company procedures and legal requirements for recording food disposals						

Additional evidence (if applicable):

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

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Unit 26: **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> <p>K1.1 how to establish a rapport with customers</p> <p>K1.2 the kinds of questions you need to ask customers in order to find out their requirements</p> <p>K1.3 where to find reliable information about the products you are responsible for selling</p> <p>K1.4 effective ways of comparing and contrasting products for customers</p> <p>K1.5 how to recognise opportunities to recommend associated or additional products</p> <p>K1.6 practical limits on portion weight, size or shape</p> <p>K1.7 how to explain tactfully to customers when portion requirements cannot be met, and what alternatives can be offered</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 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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Countersigning assessor signature (if applicable): _____ Date: _____

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Unit 27: 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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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 28: **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> <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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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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Unit 29:	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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Countersigning internal verifier (if applicable): _____ Date: _____

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

What you must do

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

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

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 30: **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> <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>		

Knowledge	Type of evidence	Date
<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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Countersigning assessor signature (if applicable): _____ Date: _____

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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						
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						

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

Additional evidence (if applicable):

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Unit 31: **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>		

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>K2.1 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>		
<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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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						
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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Countersigning internal verifier (if applicable): _____ Date: _____

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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Unit 32: Control deliveries of motor fuel on 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>		

Knowledge	Type of evidence	Date
<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> <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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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						
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: 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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 follow personal hygiene requirements after delivery						

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. 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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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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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help						

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Unit 34:	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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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: 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 35:	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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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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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 tell the customer about any sources of information they can consult concerning the product						
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):

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Unit 36:	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 37: **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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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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	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: _____

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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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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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 38: 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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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 customer's 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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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 39: **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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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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						
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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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 40:	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>		

Knowledge	Type of evidence	Date
<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> <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 anymore 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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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: 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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Countersigning assessor signature (if applicable): _____ Date: _____

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

Element 2: Replenish 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:						
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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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

Unit 41:	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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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: 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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Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

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

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

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

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

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

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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Assessor signature: _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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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						
P1.7 check that lighting is installed in line with the design brief						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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						
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						

Additional evidence (if applicable):

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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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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> <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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Assessor signature: _____ Date: _____

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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						

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>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>		

Additional evidence (if applicable):

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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.5 use valid and thorough tests to check that models work as they should, look as they should, and are safe to use						
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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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						

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Unit 48:	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> <p>K1.10 effective ways of regularly and fairly checking the progress and quality of the work of team members</p>		

Knowledge	Type of evidence	Date
<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
<p>Context-specific knowledge and understanding</p> <p>K1.21 the members, purpose and objectives of your team</p> <p>K1.22 the work required of your team</p> <p>K1.23 the available resources for undertaking the required work</p> <p>K1.24 the organisation's written health and safety policy statement and associated information and requirements</p> <p>K1.25 your team's plan for undertaking the required work</p> <p>K1.26 the skills, knowledge and understanding, experience and workloads of team members</p> <p>K1.27 your organisation's policy and procedures in terms of personal development</p> <p>K1.28 reporting lines in the organisation and the limits of your authority</p> <p>K1.29 organisational standards or levels of expected performance</p> <p>K1.30 organisational policies and procedures for deal with poor performance</p> <p>K1.31 organisational grievance and disciplinary policies and procedures</p> <p>K1.32 organisational performance appraisal systems</p>		

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

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

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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.7 take pride in delivering high quality work						
P2.8 take personal responsibility for making things happen						
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 49: **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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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: 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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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: 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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting						

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 50: 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
<p>3. Process applications from retail customers for credit facilities - you need to know and understand:</p>		
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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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: 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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Internal verifier signature: _____ Date: _____

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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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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Countersigning internal verifier (if applicable): _____ Date: _____

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

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Internal verifier signature: _____ Date: _____

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Unit 51: **Process cash and credit transactions in a retail environment**

Unit code: C.10

Unit credit: 7

Unit level: 5

Introduction

This unit is about three behind-the-scenes aspects of administering customers' credit accounts. Firstly, it is about monitoring credit accounts to ensure that customers are keeping up their payments and not exceeding their credit limits. Secondly, it concerns processing customer payments. Thirdly, the unit involves reconciling customer accounts and investigating problems.

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>		

Additional evidence (if applicable):

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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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	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: _____

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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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 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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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: _____

Unit 52: 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>		

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: 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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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: 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						

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 53: 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>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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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 54:	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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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: _____

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

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

Unit 55:	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: _____

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 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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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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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: 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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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: **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>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						
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 57: **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 who 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
<p>For the whole unit you need to know and understand:</p> <p>K1.1 how customer experience is influenced by the way service is delivered</p> <p>K1.2 how customer feedback is obtained</p> <p>K1.3 how to work with others to identify and support change in the way service is delivered</p> <p>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</p>		

Additional evidence (if applicable):

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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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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 58: **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
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						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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 59: **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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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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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 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 60: **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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	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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Assessor signature: _____ Date: _____

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

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

Unit 61: **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						
P1.7 identify goods that need to be cleaned, tidied or repaired						

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 protecting health and safety while processing donated goods						
P1.9 clean, tidy or repair goods to meet legal and company requirements for saleable goods						

Additional evidence (if applicable):

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Unit 62: **Contribute to food safety in a retail environment**

Unit code: B.20

Unit credit: 7

Unit level: 4

Introduction

This unit is about your role in helping to maintain food safety. The unit applies to you if your job involves any of these activities:

- handling wrapped food
- handling unwrapped food not subject to temperature control requirements (for example, fresh produce or bakery items)
- going into an area where food is prepared even if you do not handle the food (for example, if you clean the food preparation area).

The unit is concerned with two aspects of food safety. The first is about keeping yourself clean as you work, and the second is about noticing and reporting obvious food safety hazards such as dirt, spillage or out-of-date stock.

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

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

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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 63: **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>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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Internal verifier signature: _____ Date: _____

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

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>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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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:						
P1.1 check your area of the sales floor at suitable times to ensure: <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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Unit 65: 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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Countersigning assessor signature (if applicable): _____ Date: _____

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

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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Unit 66: **Process part-exchange sales transactions in a retail environment**

Unit code: C.07

Unit credit: 12

Unit level: 6

Introduction

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

What you must know

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

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

Knowledge	Type of evidence	Date
<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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Countersigning internal verifier (if applicable): _____ Date: _____

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

What you must do

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

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

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 follow company policies and procedures for checking who owns the item						
P2.2 work out accurately the balance the customer should pay on the item they want to buy						
P2.3 accept or refuse the customer's offers according to company policies and the discretion you are allowed						
P2.4 end the transaction politely if the customer is not willing to go ahead						
P2.5 explain clearly and accurately the terms and conditions of the sale						
P2.6 fill in the paperwork for the transaction						
P2.7 treat the customer politely throughout negotiations						

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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Unit 67:	Develop individual retail service opportunities
Unit code:	C.30
Unit credit:	6
Unit level:	6

Introduction

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

What you must know

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

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

Knowledge	Type of evidence	Date
<p>K2.9 how to approach potential clients in a way that creates a positive impression of you and your company and is likely to help create a business relationship</p> <p>K2.10 how to create a rapport quickly with prospective clients</p> <p>K2.11 the information you need to exchange with potential clients</p> <p>K2.12 why you need to keep any promises you make to potential clients, for example sending them information they have asked for</p> <p>K2.13 how to record information about potential clients so that you can use it effectively</p> <p>K2.14 why client confidentiality is important to the business relationship</p> <p>K2.15 relevant aspects of the data protection laws and company policy to do with client confidentiality</p>		

Additional evidence (if applicable):

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Element 1: Make plans for finding new retail clients

What you must do

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

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

Additional evidence (if applicable):

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Element 2: Market your service to potential retail clients

What you must do

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 exchange relevant information with potential clients when appropriate						
P2.7 record client information promptly, accurately and in a way that allows you to use the information effectively						
P2.8 store and use client information in line with data protection laws and company policy						
P2.9 when it is not possible to keep promises to potential clients, tell them promptly and offer any other suitable information or help						

Additional evidence (if applicable):

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Unit 68: **Provide a personalised sales and after-sales service to your retail clients**

Unit code: C.31

Unit credit: 8

Unit level: 6

Introduction

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

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Provide a personalised service to retail clients - you need to know and understand:</p> <p>K1.1 what consultative selling is, and how this is different from other kinds of retail selling</p> <p>K1.2 your company's desired image and how to project this to clients</p> <p>K1.3 how to use information in client records to prepare for client visits</p> <p>K1.4 how to create and maintain a rapport with clients, both new and existing</p> <p>K1.5 the types of question to ask clients to find out about their buying needs, preferences and priorities</p> <p>K1.6 when and how to ask clients tactfully how much they want to spend</p> <p>K1.7 how to keep yourself informed about the brands and services you are expected to sell, including:</p> <ul style="list-style-type: none"> • seasonal trends • new brands or services • promotions • stock levels • competitor comparisons • additional services such as store cards, gift wrapping or delivery <p>K1.8 how to relate the features and benefits of products or services to the client's needs</p> <p>K1.9 how to identify suitable opportunities to sell additional or related products</p> <p>K1.10 how to make recommendations to clients in a way that encourages them to take your advice, without pressuring them</p> <p>K1.11 why you need to balance the need to make immediate sales with the need to maintain good business relations with the client, and how to do so</p> <p>K1.12 the company's customer service standards and how to apply these when providing a personalised service to clients</p>		

Knowledge	Type of evidence	Date
<p>2. Provide an after-sales service to retail clients - you need to know and understand:</p> <p>K2.1 why you need to keep client records up-to-date and store them correctly</p> <p>K2.2 company procedures for updating client records</p> <p>K2.3 company systems and procedures for recording and storing client information</p> <p>K2.4 relevant aspects of the data protection laws and company policy for client confidentiality</p> <p>K2.5 why you should keep to clients' wishes as to how and when you may contact them</p> <p>K2.6 why you need to keep your promises to clients</p>		

Additional evidence (if applicable):

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Element 1: Provide a personalised service to retail clients

What you must do

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

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

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

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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Unit 69: **Help customers to choose specialist products in a retail environment**

Unit code: C.56

Unit credit: 7

Unit level: 6

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Help customers to choose specialist products in a retail environment - you need to know and understand:</p> <p>K1.1 your company's brand values in relation to its product offer, pricing and service</p> <p>K1.2 how your company compares with its competitors on product offer, pricing and service</p> <p>K1.3 the customer profiles for your store</p> <p>K1.4 the elements of a positive customer experience in relation both to your company and to the products you sell</p> <p>K1.5 how customers' circumstances, such as who they are with or the time of day, affect their willingness to engage in conversation with a salesperson</p> <p>K1.6 how to recognise from customers' body language whether they are likely to respond positively to an approach from a salesperson</p> <p>K1.7 how to establish and maintain a rapport with individual customers</p> <p>K1.8 the meaning of specialist terminology that knowledgeable customers are likely to use in relation to the products you sell</p> <p>K1.9 how the products you sell are produced or obtained, and how these methods affect the nature and quality of the products</p> <p>K1.10 any legal restrictions relating to the products you sell, such as where the products come from or who can buy or use the products, and how to explain these to customers</p> <p>K1.11 any health and safety considerations that customers must be warned about, or are likely to ask about, in relation to the products you sell</p> <p>K1.12 any ethical and environmental concerns that customers are likely to have about the products you sell, and how to address these</p>		

Knowledge	Type of evidence	Date
<p>K1.13 what related products are available from your organisation that would enhance customers' experience of the products you sell</p> <p>K1.14 sources of up-to-date production information and how to access and use these</p> <p>K1.15 the sources of after-sales advice and support that are available to customers</p> <p>K1.16 the customer's legal rights and the organisation's policy concerning returns</p> <p>K1.17 the importance of maintaining your own enthusiasm for the products you sell</p> <p>K1.18 how to search for and evaluate opportunities to maintain your enthusiasm for the products you sell</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: Help customers to choose specialist products in a retail environment

What you must do

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

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

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

Additional evidence (if applicable):

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Unit 70: **Demonstrate specialist products to customers in a retail environment**

Unit code: C.57

Unit credit: 5

Unit level: 6

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 judge from customers' body language and immediate circumstances whether they are likely to respond positively to an invitation to watch or take part in a product demonstration						
P1.2 organise product demonstrations in ways that ensure a smoothly-run, efficient demonstration that meets health and safety requirements						
P1.3 give demonstrations that clearly show the customer the use and value of the product						
P1.4 offer customers the opportunity to use the product themselves, when it is safe, legal and cost-effective to do so						
P1.5 encourage customers to ask questions about the products being demonstrated						
P1.6 respond to customers' comments and questions during demonstrations in ways that promote 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 take the necessary steps, within the limits of your own authority, to minimise any security risks associated with the demonstrations you carry out						

Additional evidence (if applicable):

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Unit 71: **Organise the receipt and storage of goods in a retail environment**

Unit code: B.14

Unit credit: 11

Unit level: 7

Introduction

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

What you must know

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

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

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

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 gather enough competent staff and brief them well enough before deliveries are received						
P1.2 make sure that the area for receiving goods is prepared and that you have enough storage space for the delivery						
P1.3 check that deliveries are unloaded safely and securely						
P1.4 make sure that goods are promptly checked against requirements						
P1.5 make sure that delivery records are complete and accurate and processed promptly						
P1.6 use delivery records to check that each supplier has met your company's service needs						
P1.7 spot problems with deliveries and sort them out properly						

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 organise storage facilities to take account of day-to-day work, safety requirements and the need to keep goods secure and in a saleable condition						
P2.2 give staff accurate, up-to-date information and suitable training so they can use the storage system securely, safely and in line with relevant legal requirements						
P2.3 give staff clear roles and responsibilities for storing and moving goods and check they understand these roles and responsibilities						
P2.4 develop and update plans to cope with unforeseen storage problems						
P2.5 check regularly that staff are storing and moving goods competently, safely, securely and in line with relevant legal requirements						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 keep complete, accurate and up-to-date stock records that can be found easily by everyone who needs them						

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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Unit 72: **Audit stock levels and stock inventories in a retail environment**

Unit code: B.15

Unit credit: 6

Unit level: 7

Introduction

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

What you must know

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

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

Knowledge	Type of evidence	Date
<p>2. Report the findings of a retail stock audit - you need to know and understand:</p> <p>K2.1 how to organise audit findings so that problems can be easily identified</p> <p>K2.2 methods for spotting problems in audit findings</p> <p>K2.3 the types of problem that can happen and how to sort them out</p> <p>K2.4 the layout needed for the audit report</p> <p>K2.5 who needs to see the report</p> <p>K2.6 how to distribute the report so that each person receives it on time</p>		

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 find out and make sure you understand when to carry out an audit, why it is needed, what it should cover and who needs the audit report						
P1.2 find out how the report should be laid out and the level of detail needed						
P1.3 find out what resources are available to carry out the audit						
P1.4 spot any problems that are likely to prevent you from carrying out the audit effectively in the time available, and sort them out before you start the audit						
P1.5 choose staff to help with the audit, check their availability and give responsibilities to each of them						
P1.6 brief your audit team so that they know what their responsibilities are during the audit, and how to carry out those responsibilities						

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

Additional evidence (if applicable):

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Element 2: Report the findings of a retail stock audit

What you must do

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 give or send your report to the people who need to see it, so that each person receives it on time						

Additional evidence (if applicable):

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Unit 73:	Monitor and help improve food safety in a retail environment
Unit code:	B.22
Unit credit:	12
Unit level:	6

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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Element 1: Monitor food safety at critical control points

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<p>To meet the national standard you must:</p> <p>P1.1 identify and monitor critical control points, which means you:</p> <ul style="list-style-type: none"> • identify relevant food safety control measures • allocate and supervise food safety responsibilities • identify and meet staff training needs • complete all specified operational controls and checks at the set time frequency • keep accurate and complete records of checks • obtain verification for completed checks, following set procedures 						

Performance 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 troubleshoot, which means you:</p> <ul style="list-style-type: none"> • take suitable corrective action with the appropriate degree of urgency when control measures fail • report to the appropriate person any procedures that are out of line with critical limits • seek expert advice and support for matters outside your own level of authority or expertise 						

Additional evidence (if applicable):

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Element 2: Contribute to continuous improvement of food safety

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<p>To meet the national standard you must:</p> <p>P2.1 highlight areas for improvement, which means you:</p> <ul style="list-style-type: none"> • identify and report any factors or issues that arise in your work activities which may affect the safety of food • identify and report any factors or issues within the environment, supplies or product which may affect the safety of food 						
<p>P2.2 contribute to improving food safety, which means you:</p> <ul style="list-style-type: none"> • contribute to team meetings with ideas and suggestions to improve procedures or processes • contribute to introducing new procedures and/or reviewing existing ones in order to improve food safety 						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
<p>P2.3 interpret and use food safety management procedures, which means you:</p> <ul style="list-style-type: none"> • check that you understand and can use any new control measures that are introduced relating to food safety 						

Additional evidence (if applicable):

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Unit 74: **Help customers to choose alcoholic beverages in a retail store**

Unit code: C.45

Unit credit: 6

Unit level: 6

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 follow all relevant laws and your store's policies relating to the sale of alcoholic beverages						
P1.2 when necessary, explain clearly and politely to customers the law and your store's policies relating to the sale of alcoholic beverages						
P1.3 use effective questioning techniques to establish a rapport with customers and find out what they are looking for						
P1.4 match products as closely as possible to customers' stated requirements, from the products available						
P1.5 support your product recommendations with factually correct information which is likely to give customers confidence in your recommendations						
P1.6 compare and contrast products in ways that help customers choose the products that best meet their requirements						

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

Additional evidence (if applicable):

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Unit 75: **Assist customers to obtain appropriate insurance**

Unit code: C.38

Unit credit: 12

Unit level: 6

Introduction

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

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. For the whole unit you need to know and understand:</p> <p>K1.1 the principles and practice of insurance (an introductory knowledge only) including:</p> <ul style="list-style-type: none"> • utmost good faith • insurable interest • indemnity • subrogation • contribution • risk as it relates to insurance • contract and agency • proximate cause • compulsory insurance <p>K1.2 the legal and regulatory requirements relating to securing insurance products and arrangements, including:</p> <ul style="list-style-type: none"> • an awareness of FSA rules and powers (for example Insurance Conduct of Business Rules) • your own and the company's responsibility for complying with all legislation including FSA rules, and the consequences of failing to comply • money laundering rules and cash limits • Data Protection Act (DPA) • consumer protection • financial promotions 		

Knowledge	Type of evidence	Date
<ul style="list-style-type: none"> • crime prevention measures relating to insurance: • ABI data sharing project • guidelines on the exchange of information between the police, • insurers and loss adjusters • acceptance criteria and guidelines for the reporting of suspected fraudulent insurance • claims to the police <p>K1.3 the limits of your own responsibility for dealing with insurance arrangements, complaints and claims</p>		
<p>2. Identify the customer's insurance needs - you need to know and understand:</p>		
<p>K2.1 the procedure for advising customers of your status and your company's status in relation to the products you offer</p> <p>K2.2 how to assist different types of customer:</p> <ul style="list-style-type: none"> • retail/consumer/commercial • on the telephone, face-to-face • advised/non-advised basis <p>K2.3 policies and procedures for obtaining and supplying information to customers, and keeping records of requests</p>		

Knowledge	Type of evidence	Date
<p>K2.4 when and how to pass requests for product information to a higher authority</p> <p>K2.5 the documentation that needs to be issued, and/or completed and stored, in durable medium, that may included:</p> <ul style="list-style-type: none"> • status disclosure • demands and needs statements • key fact statement <p>K2.6 legal and regulatory requirements relating to insurance products and their sale</p>		
<p>3. Agree insurance policies with the customer to enable them to be appropriately insured you need to know and understand:</p>		
<p>K3.1 how to identify the type of customer (retail/consumer or commercial)</p> <p>K3.2 how to identify the insurance products which best suit the customer</p> <p>K3.3 how to select different insurance products for different types of insurance needs and customer preferences, including:</p> <ul style="list-style-type: none"> • types of insurance • types of cover • features and benefits of different types of insurance • terms and conditions of policies • exclusions and limitations on insurance cover • cancellation rights • duration of insurance cover • premiums and fees • complaints procedures • compensation schemes 		

Knowledge	Type of evidence	Date
<p>K3.4 how to prepare, present and record written and verbal quotes for insurance agreements</p> <p>K3.5 different methods of payment and their effect on total cost</p> <p>K3.6 cancellation of cover costs</p> <p>K3.7 when you must disclose commission</p> <p>K3.8 how to calculate the premium and any other associated fees if appropriate</p> <p>K3.9 your company's procedures for the handling of client money</p>		
<p>4. Process insurance applications - you need to know and understand:</p>		
<p>K4.1 how and when to carry out credit checks</p> <p>K4.2 how to recognise inconsistencies and discrepancies in information and the correct action to take</p> <p>K4.3 common problems that occur with insurance applications and when you need to seek advice on how to deal with them or refer them</p> <p>K4.4 policies and procedures for dealing with and recording complaints</p> <p>K4.5 how to inform customers of decisions about insurance arrangements</p> <p>K4.6 the information and documentation that is needed, in the required format and in durable medium, in order to progress insurance applications, which may include:</p> <ul style="list-style-type: none"> • statement of price • demands and needs statements • key fact statement • proposal form • certificate of insurance • policy summary • policy booklet • policy schedule 		

Knowledge	Type of evidence	Date
K4.7 where and how to store completed documentation		
K4.8 legal and regulatory requirements relating to processing insurance applications		
5. Assist customers with claims - you need to know and understand:		
K5.1 when to disclose conflicts of interest and how to manage them		
K5.2 policies and procedures for giving guidance to customers on claims, and keeping appropriate records		
K5.3 policies and procedures for directing claims to the appropriate people		
K5.4 documentation that needs to be completed in order to process a claim		
K5.5 your company's complaints procedure		
K5.6 the role of the Financial Ombudsman Service		
K5.7 when and how to pass issues to a higher authority		
K5.8 policies and procedures for keeping and storing accurate records about claims		
K5.9 legal and regulatory requirements relating to claims		

Additional evidence (if applicable):

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Element 2: Identify the customer's insurance needs

What you must do

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

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

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

What you must do

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.6 where necessary, refer issues that arise during the arrangement of insurance to an appropriate authority						
P3.7 issue legible and accurate confirmation of cover where this is appropriate						
P3.8 accurately complete and store all necessary documentation in accordance with procedures						
P3.9 identify additional insurance services where appropriate and relevant to the needs of the customer						
P3.10 comply at all times with relevant legal and regulatory requirements						

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Element 4: Process insurance applications

What you must do

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

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

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

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Element 5: Assist customers with claims

What you must do

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P5.6 deal with complaints or pass them to the appropriate authority						
P5.7 if necessary, refer issues to an appropriate authority						
P5.8 make accurate and complete records at all stages and store them correctly						
P5.9 comply at all times with relevant legal and regulatory requirements						

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Unit 76: **Source required goods and services in a retail environment**

Unit code: B.16

Unit credit: 10

Unit level: 7

Introduction

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

What you must know

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

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

Knowledge	Type of evidence	Date
<p data-bbox="308 680 384 2087">2. Check and evaluate the performance of suppliers of stock for retail sale - you need to know and understand:</p> <p data-bbox="405 680 437 2087">K2.1 company systems and procedures for returning goods</p> <p data-bbox="453 680 485 2087">K2.2 the company's legal rights as a buyer</p> <p data-bbox="501 680 577 2087">K2.3 company policy for paying creditors, and who to consult in the accounts department if a supplier suspends the account</p> <p data-bbox="593 680 625 2087">K2.4 the records your company keeps about suppliers' performance and how to find and use them</p> <p data-bbox="641 680 718 2087">K2.5 who in your company can comment on the quality and delivery time of goods or services received, and when and how to ask for their comments</p> <p data-bbox="734 680 766 2087">K2.6 how to complain to suppliers</p> <p data-bbox="782 680 858 2087">K2.7 how to respond positively when colleagues complain to you about the speed or quality of suppliers' performance</p>		

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

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

Element 1: Choose suppliers and order stock for retail sale

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 check the stock records at suitable intervals and spot which stock needs replenishing						
P1.2 follow a suitable routine for asking colleagues if they expect to have any special orders						
P1.3 compare purchase requisitions to spot items you can order together						
P1.4 use the purchasing records to find out who the regular suppliers have been, if any						
P1.5 choose suitable suppliers to use, taking account of stock availability, prices, delivery times and the extent to which the supplier's practices are compatible with your company's sustainability policy						
P1.6 order items accurately, promptly and from suitable suppliers						

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

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Element 2: Check and evaluate the performance of suppliers of stock for retail sale

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 promptly match deliveries with orders so you can spot overdue items						
P2.2 spot items which are overdue and promptly contact the supplier about them						
P2.3 tell colleagues promptly if their orders will not be fulfilled on time and tell them what choices they have						
P2.4 follow procedures for returning goods and getting them replaced						
P2.5 check the quality, price and times of deliveries against the company's requirements						
P2.6 ask colleagues for comments about the quality and delivery times of items received from suppliers						
P2.7 provide accurate comments to suppliers on the level of service they provide						

Additional evidence (if applicable):

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Unit 77: Maintain the availability of goods for sale to customers in a retail environment

Unit code: C.13

Unit credit: 11

Unit level: 6

Introduction

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

What you must know

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

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

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

Additional evidence (if applicable):

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Element 1: Organise staff to display goods for retail sale

What you must do

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

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

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

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 collect and record accurate information on price changes						
P3.2 give accurate, up-to-date price information to the staff who need it						
P3.3 regularly check price marking and promptly sort out any pricing problems you spot						
P3.4 make sure that stock replenishment plans are up-to-date and realistic						
P3.5 deal with out-of-date or deteriorating stock in line with company policy and any relevant laws						
P3.6 involve staff in spotting potential improvements to the way stock is organised and presented						
P3.7 spot realistic and effective ways of improving how stock is organised and presented						

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

Additional evidence (if applicable):

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Unit 78:	Help to manage a retail team
Unit code:	E.09
Unit credit:	11
Unit level:	6

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Help to manage a retail team - you need to know and understand:</p> <p>K1.1 company procedures and policies relating to the work of your team and the way your team's daily activities are managed, including:</p> <ul style="list-style-type: none"> • health and safety • security • staffing levels • absence reporting • timekeeping • personal appearance • handling customer complaints <p>K1.2 laws and regulations relating to the products your team sells</p> <p>K1.3 why you should set an example to team members by following the company's procedures and policies at all times</p> <p>K1.4 how to check that team members follow the company's procedures and policies</p> <p>K1.5 what you must do when team members are not following the company's procedures and policies</p> <p>K1.6 how clear communication helps teams to work effectively</p> <p>K1.7 how to give instructions so that team members will readily understand them and feel motivated to follow them</p> <p>K1.8 why you need to be approachable as a team leader</p> <p>K1.9 different ways of motivating and encouraging staff, and how to choose which method to use</p>		

Knowledge	Type of evidence	Date
<p>K1.10 the kinds of support team members are likely to need, what kinds of support you can provide and how to do so</p> <p>K1.11 how to plan, prioritise and delegate so that you can fulfil your management duties as well as your other duties</p> <p>K1.12 the types of confidential information to which team leaders have access, and the importance of respecting confidentiality</p> <p>K1.13 why you must treat all team members fairly</p> <p>K1.14 the challenges involved in managing people who also know you as a friend or fellow team member, and techniques for resisting pressure from team members to abuse your responsibilities</p> <p>K1.15 the limits of your responsibility and authority when managing the team</p> <p>K1.16 who can help to sort out problems that are beyond your responsibility, authority or expertise</p> <p>K1.17 the kinds of information your manager needs from you, when it is needed and in what format</p>		

Additional evidence (if applicable):

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Element 1: Help to manage a retail team

What you must do

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

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

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

Additional evidence (if applicable):

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Unit 79:	Contribute to the continuous improvement of retail operations
Unit code:	E.10
Unit credit:	10
Unit level:	6

Introduction

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

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

What you must know

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

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

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

Additional evidence (if applicable):

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

What you must do

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

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

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Assessor signature: _____ Date: _____

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

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Element 2: Recommend ways of improving retail operations

What you must do

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

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

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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Unit 80: **Plan, monitor and adjust staffing levels and schedules in a retail environment**

Unit code: E.12

Unit credit: 11

Unit level: 7

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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

What you must do

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

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

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

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. Recruit, select and keep colleagues - you need to know and understand:</p> <p>General knowledge and understanding</p> <p>K1.1 why it is important to identify and understand why colleagues are leaving and how to do so constructively and sensitively</p> <p>K1.2 the types of reasons colleagues might give for leaving</p> <p>K1.3 how to measure staff turnover</p> <p>K1.4 the causes and effects of high and low staff turnover</p> <p>K1.5 measures which can be undertaken to address staff turnover problems</p> <p>K1.6 how to review the workload in your area in order to identify shortfalls in the number of colleagues and/or the pool of skills, knowledge, understanding and experience</p> <p>K1.7 how to identify actual skills and avoid stereotyping with regard to skills levels and work ethics</p> <p>K1.8 different options for addressing identified shortfalls and their associated advantages and disadvantages</p> <p>K1.9 what job descriptions and person specifications should cover and why it is important to consult with others in producing or updating them</p> <p>K1.10 different stages in the recruitment and selection process and why it is important to consult with others on the stages, recruitment and selection methods to be used, associated timings and who is going to be involved</p> <p>K1.11 different recruitment and selection methods and their associated advantages and disadvantages</p> <p>K1.12 why it is important to give fair, clear and accurate information on vacancies to potential applicants</p> <p>K1.13 how cultural differences in language, body language, tone of voice and dress can differ from expectations</p> <p>K1.14 how to judge whether applicants meet the stated requirements of the vacancy</p>		

Knowledge	Type of evidence	Date
<p>K1.15 sources of specialist expertise in relation to recruitment, selection and retention</p> <p>K1.16 how to take account of equality, diversity and inclusion issues, including legislation and any relevant codes of practice, when recruiting and selecting people and keeping colleagues</p> <p>K1.17 how to review the effectiveness of recruitment and selection in your area</p> <p>Industry/sector specific knowledge and understanding</p> <p>K1.18 turnover rates within similar organisations in the industry/sector</p> <p>K1.19 recruitment, selection and retention issues and specific initiatives and arrangements within the industry/sector</p> <p>K1.20 working culture and practices of the industry/sector</p> <p>Context specific knowledge and understanding</p> <p>K1.21 current people resources available to your area, including skills, knowledge, understanding and experience of colleagues</p> <p>K1.22 work requirements in your area</p> <p>K1.23 agreed operational plans and changes in your area</p> <p>K1.24 the staff turnover rate in your area</p> <p>K1.25 job descriptions and person specifications for confirmed vacancies</p> <p>K1.26 local employment market conditions</p> <p>K1.27 the organisation's structure, values and culture</p> <p>K1.28 employment policies and practices within the organisation - including recruitment, selection, induction, development, promotion, retention, redundancy, dismissal, pay and other terms and conditions</p> <p>K1.29 sources of specialist expertise in relation to recruitment, selection and retention used by your organisation</p>		

Additional evidence (if applicable):

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Element 1: Recruit, select and keep colleagues

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 talk with colleagues who are leaving your area of responsibility to identify and discuss their reasons for leaving						
P1.2 identify ways of addressing staff turnover problems, implementing those which clearly fall within your authority and communicating others to the relevant people for consideration						
P1.3 review, on a regular basis, the work required in your area of responsibility, identifying any shortfall in the number of colleagues and/or the pool of skills, knowledge, understanding and experience						
P1.4 identify and review the options for addressing any identified shortfalls and decide on the best option(s) to follow						
P1.5 consult with others to produce or update job descriptions and person specifications where there is a clear need to recruit						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 consult with others to discuss and agree stages in the recruitment and selection process for identified vacancies, the methods that will be used, the associated timings and who is going to be involved						
P1.7 ensure that any information on vacancies is fair, clear and accurate before it goes to potential applicants						
P1.8 seek and make use of specialist expertise in relation to recruiting, selecting and keeping colleagues						
P1.9 ensure that the skills needed by applicants to succeed in the recruitment process are no more than are required to perform the job						
P1.10 participate in the recruitment and selection process, as agreed, making sure that the process is fair, consistent and effective						
P1.11 make sure that applicants who are offered positions are likely to be able to perform effectively and work with their new colleagues						
P1.12 judge whether the recruitment and selection process has been successful in relation to recent appointments in your area and identify any areas for improvements						

Additional evidence (if applicable):

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Element 2: Behaviours which underpin effective performance

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 recognise the opportunities presented by the diversity of people						
P2.2 work to turn unexpected events into opportunities rather than threats						
P2.3 try out new ways of working						
P2.4 identify people's information needs						
P2.5 seek to understand people's needs and motivations						
P2.6 comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes						
P2.7 take and implement difficult and/or unpopular decisions, if necessary						
P2.8 act within the limits of your authority						
P2.9 show integrity, fairness and consistency in decision making						

Additional evidence (if applicable):

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Unit 82:	Develop productive working relationships with colleagues
Unit code:	E.15
Unit credit:	9
Unit level:	6

Introduction

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

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

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

What you must know

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

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

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

Additional evidence (if applicable):

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Element 1: Develop productive working relationships with colleagues

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 establish working relationships with all colleagues who are relevant to the work being carried out						
P1.2 recognise, agree and respect the roles and responsibilities of colleagues and, particularly in situations of matrix management, their managers' requirements						
P1.3 understand and take account of the priorities, expectations, and authority of colleagues in decisions and actions						
P1.4 create an environment of trust and mutual respect where you have no authority, or shared authority, over those you are working with						
P1.5 understand difficult situations and issues from your colleague's perspective and provide support, where necessary, to move things forward						

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

Additional evidence (if applicable):

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Element 2: Behaviours which underpin effective performance

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 present information clearly, concisely, accurately and in ways that promote understanding						
P2.2 seek to understand people's needs and motivations						
P2.3 make time available to support others						
P2.4 clearly agree what is expected of others and hold them to account						
P2.5 work to develop an atmosphere of professionalism and mutual support						
P2.6 model behaviour that shows respect, helpfulness and co-operation						
P2.7 keep promises and honour commitments						
P2.8 consider the impact of your own actions on others						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.9 say 'no' to unreasonable requests						
P2.10 show respect for the views and actions of others						

Additional evidence (if applicable):

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Unit 83:	Provide learning opportunities for colleagues
Unit code:	E.14
Unit credit:	11
Unit level:	8

Introduction

This unit is about supporting colleagues in identifying their learning needs and helping to provide opportunities to address these needs.

Encouraging colleagues to take responsibility for their own learning is an aspect of this unit as is your role in providing an 'environment', for example, in your team or area of responsibility, in which learning is valued.

For the purposes of this unit, 'colleagues' means those people for whom you have line management responsibility.

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>1. Provide learning opportunities for colleagues - you need to know and understand:</p> <p>General knowledge and understanding</p> <p>K1.1 the benefits of learning for individuals and organisations and how to promote these to colleagues</p> <p>K1.2 ways in which you can develop an ‘environment’ in which learning is valued and willingness and efforts to learn are recognised</p> <p>K1.3 why it is important to encourage colleagues to take responsibility for their own learning</p> <p>K1.4 how to provide fair, regular and useful feedback to colleagues on their work performance</p> <p>K1.5 how to identify learning needs based on identified gaps between the requirements of colleagues’ work roles and their current knowledge, understanding and skills</p> <p>K1.6 how the values, ethics, beliefs, faith, cultural conventions, perceptions and expectations of any people from other countries or cultures may impact on their personal development and learning</p> <p>K1.7 how to prioritise learning needs of colleagues, including taking account of organisational needs and priorities and the personal and career development needs of colleagues</p> <p>K1.8 the range of different learning styles and how to support colleagues in identifying the particular learning style(s) or combination of learning styles which works best for them</p> <p>K1.9 different types of learning activities, their advantages and disadvantages and the required resources (for example, time, fees, substitute staff)</p> <p>K1.10 how/where to identify and obtain information on different learning activities</p> <p>K1.11 why it is important for colleagues to have a written development plan and what it should contain (for example, identified learning needs, learning activities to be undertaken and the learning objectives to be achieved, timescales and required resources)</p>		

Knowledge	Type of evidence	Date
<p>K1.12 how to set learning objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-Bound)</p> <p>K1.13 sources of specialist expertise in relation to identifying and providing learning for colleagues</p> <p>K1.14 what type of support colleagues might need to undertake learning activities, the resources needed and the types of obstacles they may face and how they can be resolved</p> <p>K1.15 how to evaluate whether a learning activity has achieved the desired learning objectives</p> <p>K1.16 the importance of regularly reviewing and updating written development plans in the light of performance, any learning activities undertaken and any wider changes</p> <p>K1.17 how to take account of equality legislation, any relevant codes of practice and general diversity and inclusion issues in providing learning opportunities for colleagues</p> <p>Industry/sector specific knowledge and understanding</p> <p>K1.18 industry/sector requirements for the development or maintenance of knowledge, skills and understanding and professional development</p> <p>K1.19 learning issues and specific initiatives and arrangements that apply within the industry/sector</p> <p>K1.20 working culture and practices of the industry/sector</p> <p>Context specific knowledge and understanding</p> <p>K1.21 relevant information on the purpose, objectives and plans of your team or area of responsibility or the wider organisation</p> <p>K1.22 the work roles of colleagues, including the limits of their responsibilities and their personal work objectives</p> <p>K1.23 the current knowledge, understanding and skills of colleagues</p> <p>K1.24 identified gaps in the knowledge, understanding and skills of colleagues</p> <p>K1.25 identified learning needs of colleagues</p>		

Knowledge	Type of evidence	Date
<p>K1.26 learning style(s) or combinations of styles preferred by colleagues</p> <p>K1.27 the written development plans of colleagues</p> <p>K1.28 sources of specialist expertise available in/to your organisation in relation to identifying and providing learning for colleagues</p> <p>K1.29 learning activities and resources available in/to your organisation</p> <p>K1.30 your organisation's policies in relation to equality and diversity</p> <p>K1.31 your organisation's policies and procedures in relation to learning</p> <p>K1.32 your organisation's performance appraisal systems</p>		

Additional evidence (if applicable):

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Element 1: Provide learning opportunities for colleagues

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 promote the benefits of learning to colleagues and make sure that their willingness and efforts to learn are recognised						
P1.2 give colleagues fair, regular and useful feedback on their work performance, discussing and agreeing how they can improve						
P1.3 work with colleagues to identify and prioritise learning needs based on any gaps between the requirements of their work roles and their current knowledge, understanding and skills						
P1.4 help colleagues to identify the learning style(s) or combination of styles which works best for them and ensure that these are taken into account in identifying and undertaking learning activities						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.5 work with colleagues to identify and obtain information on a range of possible learning activities to address identified learning need						
P1.6 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						
P1.7 discuss and agree, with each colleague, a development plan which includes learning activities to be undertaken, the learning objectives to be achieved, the required resources and timescales						
P1.8 work with colleagues to recognise and make use of unplanned learning opportunities						
P1.9 seek and make use of specialist expertise in relation to identifying and providing learning for colleagues						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.10 support colleagues in undertaking learning activities, making sure any required resources are made available and making efforts to remove any obstacles to learning						
P1.11 evaluate, in discussion with each colleague, whether the learning activities they have undertaken have achieved the desired outcomes and provide positive feedback on the learning experience						
P1.12 work with colleagues to update their development plan in the light of performance, any learning activities undertaken and any wider changes						
P1.13 encourage colleagues to take responsibility for their own learning, including practising and reflecting on what they have learned						

Additional evidence (if applicable):

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Element 2: Behaviours which underpin effective performance

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 recognise the opportunities presented by the diversity of people						
P2.2 find practical ways to overcome barriers						
P2.3 make time available to support others						
P2.4 seek to understand individuals' needs, feelings and motivations and take an active interest in their concerns						
P2.5 encourage and support others to make the best use of their abilities						
P2.6 recognise the achievements and the success of others						
P2.7 inspire others with the excitement of learning						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.8 confront performance issues and sort them out directly with the people involved						
P2.9 say 'no' to unreasonable requests						
P2.10 show integrity, fairness and consistency in decision making						

Additional evidence (if applicable):

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Unit 84:	Enable customers to apply for credit and hire purchase facilities
Unit code:	C.15
Unit credit:	12
Unit level:	6

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>1. Identify the retail customer's credit or hire-purchase requirements - you need to know and understand:</p> <p>K1.1 the range of borrowing facilities your company offers</p> <p>K1.2 the legal requirements for all aspects of the borrowing transaction</p> <p>K1.3 the terms and conditions that apply to specific borrowing facilities</p> <p>K1.4 how to work out the annual percentage rate (APR) and the difference between the annual percentage rate and simple interest</p> <p>K1.5 how to carry out credit checks and authorise credit applications</p>		
<p>2. Advise retail customers on the features of borrowing facilities - you need to know and understand:</p> <p>K2.1 the terms and conditions of the borrowing facilities you are authorised to offer customers</p> <p>K2.2 why you must help customers to understand their responsibilities in relation to the borrowing facility</p> <p>K2.3 how to explain the terms and conditions of borrowing facilities in ways that different customers can understand</p> <p>K2.4 how to give customers the chance to ask questions and check they understand</p> <p>K2.5 how to prepare accurate written quotations from the information the customer has given</p> <p>K2.6 the information that your company and the law need you to provide to customers in relation to borrowing facilities, and where you can get this</p> <p>K2.7 how to talk to customers about borrowing facilities in ways that promote goodwill and confidence in you and the store</p>		

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

Additional evidence (if applicable):

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

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

What you must do

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

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

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 explain to the customer clearly and accurately the terms and conditions of the borrowing facility						
P2.2 check with the customer that they understand their responsibilities in relation to the borrowing facility						
P2.3 give customers the chance to check they understand and to ask questions about the borrowing facility						
P2.4 give customers chance to compare the benefit and value of different borrowing options where they are available						
P2.5 give the customer accurate written quotations together with all the information your company and the law say						
P2.6 deal with the customer politely and in a way that promotes goodwill and confidence in you and the store						

Additional evidence (if applicable):

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

What you must do

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

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

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

Additional evidence (if applicable):

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Unit 85: Evaluate the receipt of payments from customers

Unit code: C.16

Unit credit: 9

Unit level: 6

Introduction

This unit is about evaluating the way payments are processed by staff at point of sale. Firstly, it involves spotting any problems with the way payments are processed and sorting these out promptly. Secondly, the unit involves monitoring that staff are following the company's takings practices and procedures.

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. Evaluate takings practices and procedures in a retail environment - you need to know and understand:</p> <p>K1.1 the aims that takings practices and procedures are designed to achieve</p> <p>K1.2 how the way that payment transaction procedures are carried out can affect customer goodwill</p> <p>K1.3 the company's takings procedures, including safety and security arrangements</p> <p>K1.4 the control systems available and the information they provide</p> <p>K1.5 how to collect and interpret information about takings</p> <p>K1.6 how to check takings practices and procedures</p> <p>K1.7 types of problems with takings you need to look for</p> <p>K1.8 how to sort out problems with takings</p> <p>K1.9 the limits of your authority for resolving problems with takings</p> <p>K1.10 how to report your findings on takings practices and procedures</p>		

Knowledge	Type of evidence	Date
<p>2. Monitor takings practices and processes at the cash point in a retail environment - you need to know and understand:</p> <p>K2.1 methods of payment that are accepted in your store</p> <p>K2.2 how to check that cash points are being correctly set up and operated</p> <p>K2.3 the problems that can arise in routine cash point operations and transactions, and how to sort them out</p> <p>K2.4 the company's approved procedures for handling cash and cash equivalents, and how to follow these efficiently</p> <p>K2.5 the types of refund and payment which need your authorisation, and the procedures for authorising these</p> <p>K2.6 the company's cash point security procedures</p> <p>K2.7 how to plan to cope with unexpected problems at the cash point</p>		

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Element 1: Evaluate takings practices and procedures 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 that staff carry out takings practices and procedures in line with company requirements						
P1.2 spot and promptly sort out any problems with takings practices and procedures						
P1.3 check payment processes and transaction procedures to make sure they maintain and promote customer goodwill						
P1.4 check at suitable times that review and control systems are providing up-to-date and accurate information						
P1.5 promptly sort out any identified problems, or refer them promptly to the right person when problems are beyond your responsibility to sort out						

Additional evidence (if applicable):

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Element 2: Monitor takings practices and processes at the cash point 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 at suitable times that staff are setting up and operating cash points correctly						
P2.2 look into and promptly sort out any problems with routine cash point operations and transactions						
P2.3 check that staff are handling cash and cash equivalents efficiently and in line with approved procedures						
P2.4 authorise refunds and payments promptly and in line with company procedures						
P2.5 correctly follow cash point security procedures						
P2.6 develop effective plans to cope with unexpected problems at the cash point						

Additional evidence (if applicable):

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Unit 86: Monitor and support secure till use during trading hours

Unit code: E.21

Unit credit: 3

Unit level: 6

Introduction

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

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

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

What you must know

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

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 during trading hours, check the till and service area often enough to ensure that personal data is kept confidential						
P1.2 authorise till transactions and adjustments within the limits of your authority and in line with company procedures for: <ul style="list-style-type: none"> • customer service • security • stock control 						
P1.3 refer till transactions and adjustments promptly to the right person when you cannot authorise these yourself						
P1.4 top up the change in the till in a timely fashion and in line with company security procedures						
P1.5 check the authorisation of anyone who draws cash or cash equivalents from the till during trading hours						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 prioritise your tasks so as to minimise customer waiting times and queue size						

Additional evidence (if applicable):

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Unit 87: Monitor and evaluate the quality of service provided to your customers by external suppliers

Unit code: E.17

Unit credit: 9

Unit level: 6

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 keep accurate and up-to-date records of the customer orders sent from your store to external suppliers						
P1.2 regularly check the progress of orders to identify any difficulties or delays in dealing with them						
P1.3 when service is delayed, get an explanation and tell your customer promptly and accurately what is happening						
P1.4 accurately identify whether your customer is satisfied with the ordering service provided						
P1.5 identify and accurately note any customer dissatisfaction with the ordering service and the causes of this						
P1.6 tactfully explain when the problem is your customer's responsibility						

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

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

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

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

What you must do

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

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 accurately note, and report to your manager, agreements to improve customer service						
P2.7 make an accurate report to your manager, together with your recommendations for action, if suppliers do not improve service						

Additional evidence (if applicable):

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Unit 88: **Organise the delivery of reliable customer service**

Unit code: D.13

Unit credit: 6

Unit level: 6

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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

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

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

What you must do

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

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

Additional evidence (if applicable):

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

Element 2: Review and maintain customer service delivery

What you must do

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

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

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

Additional evidence (if applicable):

--

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Element 3: Use recording systems to maintain reliable customer service

What you must do

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

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

Additional evidence (if applicable):

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Unit 89: **Improve the customer relationship**

Unit code: D.14

Unit credit: 7

Unit level: 6

Introduction

To improve relationships with your customers you need to deliver consistent and reliable customer service. In addition, customers need to feel that you genuinely want to give them high levels of service and that you make every possible effort to meet or exceed their expectations. This encourages loyalty from external customers or longer-term service partnerships with internal customers. You need to be proactive in your dealings with your customers and to respond professionally in all situations. You need to negotiate between your customers and your organisation or department in order to find some way of meeting your customers' expectations. In addition you need to make extra efforts to delight your customers by exceeding their customer service expectations.

What you must know

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

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

Additional evidence (if applicable):

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Element 1: Improve communication with your customers

What you must do

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

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

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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Element 3: Exceed customer expectations to develop the relationship

What you must do

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

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

Additional evidence (if applicable):

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Unit 90: **Work with others to improve customer service**

Unit code: D.15

Unit credit: 8

Unit level: 6

Introduction

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

What you must know

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

Knowledge	Type of evidence	Date
<p>Knowledge and understanding which relates to the whole of this unit - you need to know and understand:</p>		
K1.1		
K1.2		
K1.3		
K1.4		
K1.5		

Additional evidence (if applicable):

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Element 1: Improve customer service by working with others

What you must do

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

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

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

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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: Monitor your own performance when improving customer service

What you must do

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

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

Additional evidence (if applicable):

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

Element 3: Monitor team performance when improving customer service

What you must do

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

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

Additional evidence (if applicable):

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

Unit 91: Monitor and solve customer service problems

Unit code: D.16

Unit credit: 6

Unit level: 6

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

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

Element 1: Solve immediate customer service problems

What you must do

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

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

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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

What you must do

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

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

Additional evidence (if applicable):

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Unit 92:	Promote continuous improvement
Unit code:	D.17
Unit credit:	7
Unit level:	7

Introduction

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

What you must know

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

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

Additional evidence (if applicable):

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

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

What you must do

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

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

Additional evidence (if applicable):

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Element 2: Implement changes in customer service

What you must do

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

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

Additional evidence (if applicable):

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Element 3: Review changes to promote continuous improvement

What you must do

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

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

Additional evidence (if applicable):

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Unit 93: **Help to monitor and maintain the security of the retail unit**

Unit code: E.11

Unit credit: 11

Unit level: 6

Introduction

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

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

What you must know

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

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

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

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

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

What you must do

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

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

Additional evidence (if applicable):

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

Element 2: Monitor and investigate losses in a retail environment

What you must do

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

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

Additional evidence (if applicable):

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Unit 94:	Monitor and maintain health and safety in a retail environment
Unit code:	E.18
Unit credit:	13
Unit level:	6

Introduction

This unit is about your responsibility for helping to monitor and safeguard health and safety in your store. Firstly, it involves carrying out day-to-day monitoring, specific regular checks and planned assessments. You need to keep written records of the health and safety assessments you carry out. You also need to train staff to help protect health and safety.

Secondly, the unit is about taking charge of accidents and emergencies. This includes contacting the emergency services, setting off alarms, beginning and supervising evacuation, and reducing further injury or damage as far as possible until specialist help arrives.

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. Assess and control risks to health and safety in a retail environment - you need to know and understand:</p> <p>K1.1 your rights, duties and responsibilities under current legislation relating to:</p> <ul style="list-style-type: none"> • health and safety at work • managing health and safety at work • reporting injuries, diseases and dangerous occurrences • substances that can endanger health • first aid • fire precautions <p>K1.2 the company's procedures for managing health and safety incidents, including the type and frequency of safety checks to be carried out</p> <p>K1.3 where to get information and advice about health and safety laws, policy and procedures</p> <p>K1.4 who to report assessment results and risks to</p> <p>K1.5 what safety equipment and protective clothing is available and the instructions for using this</p> <p>K1.6 how to identify and control different dangers</p> <p>K1.7 why you need to assess risks and how to do this</p> <p>K1.8 how to communicate effectively to control risks</p>		

Knowledge	Type of evidence	Date
<p>2. Put accident and emergency procedures into practice in a retail environment - you need to know and understand:</p> <p>K2.1 how you are likely to react when accidents and emergencies happen, and how to stay calm in these situations</p> <p>K2.2 different methods of containing and controlling threatening and violent behaviour and how to decide which method to use</p> <p>K2.3 who is responsible for protecting your retail unit, controlling dangers and managing incidents, and how to contact them</p> <p>K2.4 how to set the alarm systems off</p> <p>K2.5 your responsibilities when the workplace needs to be evacuated</p> <p>K2.6 the escape routes from your retail unit and how to access them safely</p>		

Additional evidence (if applicable):

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

Element 1: Assess and control 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:						
P1.1 monitor the working area continually to make sure it is clean and free from dangers						
P1.2 when you cannot control a danger, get advice immediately from the appropriate authority						
P1.3 give staff training, instructions and information to allow them to do their work safely						
P1.4 check accurately and often enough that staff are using protective equipment according to the instructions they have been given						
P1.5 regularly and accurately carry out health, safety and maintenance checks in line with						
P1.6 carry out assessments which clearly and accurately identify significant dangers						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 where assessments identify risks, prioritise these in the order in which they should be dealt with						
P1.8 review and update assessment procedures to take account of changes in factors affecting health and safety						
P1.9 record assessments accurately and make the records available to those who need them						

Additional evidence (if applicable):

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Element 2: Put accident and emergency procedures into practice in a retail environment

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 act promptly and in line with company procedures to prevent injury and damage and to contain potential unsafe situations in the work area						
P2.2 immediately contact the people and services responsible for managing accidents and emergencies						
P2.3 use safety equipment in line with the manufacturer's guidelines						
P2.4 when you evacuate the building make sure that staff and customers leave immediately using approved escape routes, and that officials responding to requests for help are given access						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.5 identify threatening and violent behaviour, and act promptly to protect staff and customers and to isolate anyone acting violently or making threats						

Additional evidence (if applicable):

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Unit 95: **Choose merchandise to feature in visual merchandising displays**

Unit code: C.24

Unit credit: 6

Unit level: 6

Introduction

This unit is for visual merchandising specialists and involves using design information to identify what you need for displays and choosing merchandise to feature in displays.

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 requirements for retail displays - you need to know and understand:</p> <p>K1.1 how to identify the purpose of displays from design information</p> <p>K1.2 how to identify the merchandise you will use</p> <p>K1.3 how displays attract the interest of customers and persuade them to make buying decisions</p> <p>K1.4 the role of displays in marketing, promotional and sales campaigns and activities</p> <p>K1.5 good practice in creating displays that have the visual effect needed</p> <p>K1.6 company policy for merchandising and visual design</p> <p>K1.7 sources of information about the merchandise you will use</p> <p>K1.8 who to check your interpretations with</p>		
<p>2. Choose and agree retail merchandise to be featured in displays - you need to know and understand:</p>		
<p>K2.1 how to compare selected merchandise with the display requirements</p> <p>K2.2 how to check whether merchandise is available</p> <p>K2.3 how to arrange for merchandise to be delivered</p> <p>K2.4 why displays are used to attract the interest of customers and persuade them to make buying decisions</p> <p>K2.5 how light, colour, texture, shape and dimension combine to achieve the visual effects you need</p> <p>K2.6 why you are expected to show creativity in selecting merchandise for displays and to be aware of trends</p>		

Knowledge	Type of evidence	Date
<p>K2.7 how displays can achieve add-on sales</p> <p>K2.8 different approaches to use for displaying different kinds of merchandise</p> <p>K2.9 the different purposes of displays and their use in visual merchandising</p> <p>K2.10 company policy for merchandising and visual design</p> <p>K2.11 the decision-makers who you need to agree your choices of merchandise with</p> <p>K2.12 the people who can supply the merchandise you need for the display</p>		

Additional evidence (if applicable):

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Element 1: Interpret requirements 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 purpose of the display, the merchandise you will use and how the merchandise will feature in the display						
P1.2 where there is scope for interpretation, interpret the requirements for the display in line with the company's design policy						
P1.3 check your interpretations with the right person before work starts on putting the display together						

Additional evidence (if applicable):

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Element 2: Choose and agree retail merchandise to be featured in 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 evaluate the potential of merchandise to attract customers' attention and interest						
P2.2 choose merchandise that is the most likely to attract and interest customers, meets the requirements of the display and is consistent with the company's visual-display policy						
P2.3 check the suitability and availability of merchandise with the relevant decision-makers						
P2.4 reach agreement with decision-makers concerning realistic arrangements and timescales for supply						
P2.5 promptly make other arrangements to get hold of merchandise if it is not available within your timescales and cost limits						

Additional evidence (if applicable):

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Unit 96: **Plan, monitor and control how graphics are used in visual merchandising displays**

Unit code: C.25

Unit credit: 8

Unit level: 6

Introduction

This unit is for visual merchandising specialists and is all about ensuring that graphics are used effectively in displays. There are three aspects to this unit. Firstly, it is about choosing graphics, signs and tickets to make displays more attractive and informative to customers. Secondly, it involves organising the distribution of graphics, signs and tickets and their use in displays. Thirdly, you need to check that graphics, signs and tickets are being used consistently with the purpose of the display and any relevant company and legal 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. Identify and get hold of graphic materials for retail displays - you need to know and understand:</p> <p>K1.1 how to identify the need for graphic materials, and the factors affecting their use and style</p> <p>K1.2 how to check your interpretations of the graphic materials you need</p> <p>K1.3 how to choose graphic materials and say how they should be used</p> <p>K1.4 how to check that proposals for graphic materials are consistent with the company's design policy and aims</p> <p>K1.5 how to brief suppliers about requirements</p> <p>K1.6 the part graphic materials play in displays</p> <p>K1.7 the part graphic materials have in attracting customers and giving them information</p> <p>K1.8 approaches to using graphic materials for different types of merchandise</p> <p>K1.9 the company's visual-design policy</p> <p>K1.10 legal requirements relating to graphic materials</p> <p>K1.11 the accepted ways of describing types and quantities of graphic materials so that suppliers understand what you need</p> <p>K1.12 company procedures and requirements for ordering graphic materials</p> <p>K1.13 who the relevant decision-makers are</p> <p>K1.14 who can supply graphic materials</p>		

Knowledge	Type of evidence	Date
<p>2. Co-ordinate how graphic materials are used in retail displays - you need to know and understand:</p> <p>K2.1 how to confirm whether graphic materials are available</p> <p>K2.2 how to check that graphic materials are suitable</p> <p>K2.3 how to produce instructions for installing graphic materials</p> <p>K2.4 how to check that installations are satisfactory</p> <p>K2.5 the part graphic materials play in displays</p> <p>K2.6 the part graphic materials have in attracting and informing customers</p> <p>K2.7 different approaches to using graphic materials for different merchandise</p> <p>K2.8 company and legal requirements for graphic materials</p>		
<p>3. Check how graphic materials are used in retail displays - you need to know and understand:</p> <p>K3.1 how to check how you should use graphic materials</p> <p>K3.2 how to ask for and collect comments from colleagues about using graphic materials</p> <p>K3.3 why it is important to check how graphic materials are used</p> <p>K3.4 the action to take when graphic materials are not being used correctly</p> <p>K3.5 the part graphic materials play in displays</p> <p>K3.6 the part graphic materials have in attracting customers and giving them information</p> <p>K3.7 different approaches to using graphic materials for different merchandise</p> <p>K3.8 company procedures for dealing with cases where graphic materials are not being used in line with policy</p>		

Additional evidence (if applicable):

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Element 1: Identify and get hold of graphic materials 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 the design brief and information about the layout to identify the graphic materials you need						
P1.2 identify the types and quantities of graphic materials you need to order and the associated costs, delivery dates and delivery addresses						
P1.3 confirm what you need with the relevant decision-makers						
P1.4 choose graphic materials that are consistent with legal requirements and the company's visual-design policy						
P1.5 use the accepted ways of describing the type and quantity of graphic materials needed						
P1.6 confirm that proposals for using graphic materials are consistent with design policy and aims and are acceptable to decision-makers						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 specify clearly to suppliers what graphic materials you need						

Additional evidence (if applicable):

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Element 2: Co-ordinate how graphic materials are used 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 check that graphic materials meet specifications, legal requirements and company policy						
P2.2 distribute graphic materials to the right places by the agreed deadlines						
P2.3 promptly give colleagues clear, accurate and up-to-date instructions for installing graphic materials						
P2.4 check that graphic materials are correctly installed and maintained						

Additional evidence (if applicable):

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Element 3: Check how graphic materials are used 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:						
P3.1 check displays yourself as far as possible and encourage colleagues to provide relevant information about using graphic materials						
P3.2 collect enough relevant information about the way graphic materials are being used						
P3.3 check whether graphic materials are being used suitably and effectively						
P3.4 take prompt and suitable action when graphic materials are not being used or maintained in line with company policy or the design brief						
P3.5 spot situations where the way graphic materials are used should change, promptly making any changes needed						

Additional evidence (if applicable):

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Unit 97: **Monitor the effect of visual merchandising displays and layouts**

Unit code: C.26

Unit credit: 10

Unit level: 6

Introduction

This unit is for visual merchandising specialists and is all about finding out whether displays and layouts are having the desired effect on customers and encouraging them to purchase the items being promoted. This involves two activities. Firstly, you need to gather the right kinds of information about customers' responses to displays and layouts. Secondly, you need to assess the effect of displays and layouts on customer behaviour and business performance and report your findings to decision-makers.

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. Gather information about retail customers' responses to displays and layouts - you need to know and understand:</p> <p>K1.1 how to organise the collecting of information about customers' responses, such as sales figures, footfall and customer flow</p> <p>K1.2 how to bring together, compare and interpret information about customers' responses to displays</p> <p>K1.3 how to choose the information that is most useful for judging the effect of displays</p> <p>K1.4 why you need information about customers' responses to displays and how to use it to decide what needs improving</p> <p>K1.5 how constantly improving the design of displays helps to attract and interest customers</p> <p>K1.6 how to recognise what different designs are meant to achieve and the types of customer they should attract</p> <p>K1.7 what customer-focused trading is</p> <p>K1.8 the meaning of 'validity' and 'reliability' in relation to customer responses</p> <p>K1.9 useful sources of information about customers' responses</p> <p>K1.10 company procedures and requirements for collecting information about customers' responses to displays</p>		

Knowledge	Type of evidence	Date
<p>2. Assess and report the effect of retail displays and layouts - you need to know and understand:</p>		
<p>K2.1 how constantly improving the design of displays and layouts helps to attract and interest customers</p> <p>K2.2 the meaning of validity and reliability in relation to interpreting information about customers' responses to displays and layouts</p> <p>K2.3 the decisions that will be based on your findings and recommendations and the effect these decisions will have</p> <p>K2.4 how to judge fairly the evidence of customers' responses against the agreed standards for displays and layouts</p> <p>K2.5 how to draw reasonable conclusions about the effect of displays and layouts, bearing in mind the purpose of the display or layout and customers' responses to it</p> <p>K2.6 how to recognise improvements you could make to the way visual merchandising is carried out in your store</p> <p>K2.7 who can make decisions about the way visual merchandising is carried out in your store</p> <p>K2.8 how to present your findings and recommendations clearly to decision-makers</p>		

Additional evidence (if applicable):

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Element 1: Gather information about retail customers' responses to displays and layouts

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 recognise when you need information about customers' responses, why you need it, and what type of information would be most useful						
P1.2 gather information about customers' responses in ways that are suitable for your purposes, in line with the company's communications policy and likely to keep the goodwill and co-operation of those providing the information						
P1.3 gather enough information to allow you to make judgements about customers' responses to displays and layouts						
P1.4 accurately interpret information about customers' responses						
P1.5 assess information fairly when reviewing the effect of displays and layouts						

Additional evidence (if applicable):

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Element 2: Assess and report the effect of retail displays and layouts

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 agree suitable standards for assessing the effect of displays and layouts						
P2.2 judge fairly the evidence of the effect of displays and layouts against the agreed standards						
P2.3 draw conclusions that are reasonable in terms of the purpose of the display and customers' responses to it						
P2.4 clearly identify improvements you could make to the way visual merchandising is carried out in your store						
P2.5 report your findings and recommendations clearly to decision-makers						

Additional evidence (if applicable):

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Unit 98: **Allocate, monitor and control visual merchandising project resources against budgets**

Unit code: C.27

Unit credit: 10

Unit level: 6

Introduction

This unit is for visual merchandising specialists and is all about your responsibility for putting together project budgets and making sure project costs stay within budget as the project progresses. Putting a budget together involves estimating the likely costs of the project, working out ways of achieving best value for money, and justifying your recommendations to decision-makers. Keeping within budget involves recording and monitoring project spending, identifying any unacceptable spending and taking prompt action to sort it 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. Negotiate and agree costs for visual merchandising projects - you need to know and understand:</p> <p>K1.1 how to make reasonable estimates of the costs of proposed projects</p> <p>K1.2 how to use estimated costs to support the business case for proposed projects</p> <p>K1.3 who to ask for comments to help you strengthen your business case for the spending you are recommending</p> <p>K1.4 the approved layout for budget proposals</p> <p>K1.5 who can approve budget proposals</p> <p>K1.6 how to present budget proposals clearly and persuasively to decision-makers</p> <p>K1.7 where you can find information about the costs of activities and resources</p> <p>K1.8 how to put together accurate budgets from agreed budget proposals</p> <p>K1.9 how to brief colleagues about the cost limits they must work within</p> <p>K1.10 how controlling spending and using resources efficiently help the company and the reputation of visual merchandising</p> <p>K1.11 the company's budgeting procedures and deadlines</p>		

Knowledge	Type of evidence	Date
<p>2. Control costs for visual merchandising projects - you need to know and understand:</p> <p>K2.1 what costs project budgets include and how these are set out</p> <p>K2.2 how to record project expenses</p> <p>K2.3 the financial information you need to refer to and when and how it is presented</p> <p>K2.4 how to interpret reports of actual spending against budgeted spending</p> <p>K2.5 how to recognise unacceptable differences between actual and budgeted spending</p> <p>K2.6 the company's procedures for reporting and acting on cost variations</p> <p>K2.7 what 'value for money' means, and why it does not simply mean paying the lowest prices</p> <p>K2.8 how to recognise and use chances to increase value for money within projects</p> <p>K2.9 how controlling spending and using resources efficiently help the company and the reputation of visual merchandising</p>		

Additional evidence (if applicable):

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Element 1: Negotiate and agree costs for visual merchandising projects

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 your estimates of the costs of proposed projects are reasonable						
P1.2 prepare business cases for spending proposals that show clearly how you can achieve value for money						
P1.3 ask colleagues to suggest ways you could strengthen your business case						
P1.4 present proposals clearly and persuasively to decision-makers						
P1.5 work out accurate costs and agree budgets with decision-makers in a way that keeps them committed to the project's aims						
P1.6 explain clearly to colleagues the cost limits they must work within						

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Element 2: Control costs for visual merchandising projects

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 accurate, complete and up-to-date records of project spending						
P2.2 promptly identify unacceptable differences in project costs, sort them out promptly when you have the authority to do so, and report them promptly to the right person when you cannot sort them out yourself						
P2.3 recognise chances to improve value for money within budget limits and promptly act on these						
P2.4 keep the right people informed of project activities and costs						

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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 developing the company's visual-design policy for its retail stores - you need to know and understand:</p> <p>K1.1 the company's current visual-design policy</p> <p>K1.2 who your internal and external customers are</p> <p>K1.3 how to find out about and recognise what internal and external customers hope for and expect from the visual design in the store</p> <p>K1.4 accepted good practice in visual design</p> <p>K1.5 how to decide if current and recent designs follow accepted good practice in visual design</p> <p>K1.6 how to spot opportunities for new and better ways of using visual design</p> <p>K1.7 the format to use when making recommendations</p> <p>K1.8 how to put together and present recommendations for developing the visual-design policy</p> <p>K1.9 how visual design helps to promote and sell goods and services</p> <p>K1.10 what customer-focused design is</p> <p>K1.11 how merchandising helps the company to achieve its aims</p>		

Knowledge	Type of evidence	Date
<p>2. Support staff putting into practice the company's visual-design policy for its retail stores - you need to know and understand:</p> <p>K2.1 what the company's visual-design policy is</p> <p>K2.2 the role of visual design in retail</p> <p>K2.3 good practice in creating visual effect by using displays</p> <p>K2.4 the different purposes of displays and their use in visual merchandising</p> <p>K2.5 why different kinds of merchandise need displaying in different ways</p> <p>K2.6 different approaches to using design for different types of merchandising</p> <p>K2.7 how designs achieve the visual effects required by displays</p> <p>K2.8 how to brief staff and internal customers about the visual-design policy</p> <p>K2.9 how to explain the visual-design policy so that staff and internal customers will understand it</p> <p>K2.10 how to motivate staff to follow the visual-design policy</p> <p>K2.11 how to check that visual designs are consistent with the visual-design policy</p> <p>K2.12 how to check that displays keep to the visual-design policy</p>		

Additional evidence (if applicable):

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Element 1: Contribute to developing the company's visual-design policy for its retail stores

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 accurate and up-to-date information about what internal and external customers want and expect from the visual design in the store						
P1.2 accurately analyse information to identify internal and external customers' wishes and expectations						
P1.3 accurately and fairly decide if current and recent designs follow accepted good practice in visual design						
P1.4 use available information to spot opportunities for improving visual-design policy and for introducing new design ideas						
P1.5 reach reasonable conclusions as to whether your new ideas and suggestions for improvement are relevant to the needs of the company and developing the visual-design policy						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 recommend clearly to decision-makers those improvements and new ideas that you decide are relevant and present these in the format needed and by the agreed deadlines						

Additional evidence (if applicable):

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Element 2: Support staff putting into practice the company's visual-design policy for its retail stores

What you must do

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 present accurate and up-to-date information about the company's visual-design policy						
P2.2 present information about the company's visual-design policy to staff in a way that is likely to encourage understanding and commitment						
P2.3 give staff the chance to ask questions about the visual-design policy						
P2.4 check that visual designs are consistent with the visual-design policy						
P2.5 promptly correct any designs that do not keep to the visual-design policy						
P2.6 give internal customers accurate information about the visual-design policy and how it affects visual merchandising in their areas						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.7 check displays to make sure they conform to the visual-design policy, are used correctly and kept in the condition needed for as long as they are in use						
P2.8 promptly report to your manager any problems with keeping displays in the condition needed						

Additional evidence (if applicable):

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Unit 100: **Create plans, elevations and drawings to realise visual merchandising ideas**

Unit code: C.29

Unit credit: 10

Unit level: 6

Introduction

This unit is for visual merchandising specialists and is all about designing layouts and producing diagrams and instructions that will enable staff to realise your designs. The unit is firstly about developing creative solutions for layout designs within the limits of time, budget and any guidelines you must follow. This involves testing that ideas are realistic, as well as asking for and using the suggestions of decision-makers. The second aspect of the unit is about producing guidance that will allow staff to put layouts together. This involves working out what is involved in putting layouts together and giving instructions using schematic drawings and detailed written specifications.

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. Develop and test solutions for retail display layouts - you need to know and understand:</p> <p>K1.1 how to gather and evaluate ideas and information about layout design</p> <p>K1.2 how to develop, evaluate and modify design options</p> <p>K1.3 how to work up designs in detail and maintain a creative approach while doing so</p> <p>K1.4 how to choose and combine scale, shape, colour, texture and focal points to produce creative design solutions</p> <p>K1.5 how to apply techniques of layout design, including drawing conventions and standards</p> <p>K1.6 how to test and judge whether designs are practical</p> <p>K1.7 who the relevant decision-makers are</p> <p>K1.8 how to consult with decision-makers throughout the design process</p> <p>K1.9 why you need to review layout designs and come up with solutions which are both creative and suitable</p> <p>K1.10 what layout design is and its part in effective visual merchandising</p> <p>K1.11 the nature and processes of creativity and layout design</p> <p>K1.12 the part played in creative design by dimension, shape, colour, texture and location</p> <p>K1.13 sources of information about the design requirements and possible layout solutions</p>		

Knowledge	Type of evidence	Date
<p>2. Produce guidance for putting retail display layouts together - you need to know and understand:</p> <p>K2.1 why specifications, drawings and supporting information are needed for putting layouts together</p> <p>K2.2 how to produce specifications and drawings to the technical standards needed</p> <p>K2.3 how to estimate quantities and costs</p> <p>K2.4 how to specify the standard of finished work</p> <p>K2.5 how to identify and specify the need for specialist services</p> <p>K2.6 how to describe methods for putting layouts together</p> <p>K2.7 how to recognise risks to health and safety arising from putting layouts together</p> <p>K2.8 how to draw the users' attention to health and safety risks and the preventive action they must take</p> <p>K2.9 how to identify and assess the conditions under which the layout will be put together</p> <p>K2.10 who puts together layouts in your company and who uses them</p> <p>K2.11 the drawing and coding conventions and standards to use</p> <p>K2.12 the supporting information needed by those who will put the layout together</p>		

Additional evidence (if applicable):

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Element 1: Develop and test solutions for retail display layouts

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 work out what kind of layout is needed and check this with decision-makers						
P1.2 gather information from reliable sources about layout design and ideas for layout design						
P1.3 evaluate information and ideas about layout design to see how relevant they are for your needs						
P1.4 suggest a wide enough range of layout options so you can come up with a creative solution						
P1.5 evaluate layout options against the design requirements and choose those which offer the most creative solution possible within time and cost limits						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 continue improving the preferred layouts until you have a detailed layout that meets the design requirements and which can be achieved within the agreed time and cost limits						
P1.7 check carefully that there is enough space for the preferred layout in the sales areas						
P1.8 when there is not enough space available for the preferred layout, adapt the layout so that it will fit the space and can still be used as intended and have the desired effect						
P1.9 consult decision-makers fully throughout the design development process, clearly acknowledge changes they suggest, and use these when they improve the usefulness and creativity of the design						

Additional evidence (if applicable):

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Element 2: Produce guidance 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 draw layouts accurately						
P2.2 use accepted drawing techniques, graphic conventions and coding conventions to give information						
P2.3 specify accurately and clearly the dimensions and orientation of the layout and the standards of the finished work						
P2.4 estimate the quantities and costs of materials needed within cost limits and the design requirement						
P2.5 estimate costs of materials only if there are no existing stocks you can use						
P2.6 recognise when you need to use specialist services						
P2.7 identify the correct methods for putting layouts together and any risks to health and safety involved in putting layouts together and using them						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.8 provide enough information to allow people to put the layout together efficiently						
P2.9 tell people clearly and accurately what they must do to protect their own and others' health and safety while they are putting layouts together						

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Email: publication.orders@edexcel.com

Publications Code SV030006 February 2012

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