

SVQ in Retail Skills at SCQF Level 5

Scottish Vocational Qualifications

Specification

First registration January 2019

Issue 1

Edexcel, BTEC and LCCI qualifications

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ISBN 978 1 446 95933 6

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1 Introducing Scottish Vocational Qualifications

What are Scottish Vocational Qualifications?

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

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

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

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

Levels and sizes of SVQs

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

- Level; and
- credit points.

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

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

For more information on the SCQF go to scqf.org.uk

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

2 Qualification summary and key information

Qualification title	SVQ in Retail Skills at SCQF Level 5
Operational start date	01/01/2019
Minimum age	16
Number of required units	10
Credit points	32–80
Assessment	Portfolio of evidence (internal assessment).
Grading information	The qualification and units are graded pass/fail.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow the <i>A guide to recruiting with integrity and enrolling learners onto qualifications</i> (see <i>Section 7 Access and Recruitment</i>).
Funding	Details of funding approval are available from Skills Development Scotland at: www.skillsdevelopmentscotland.co.uk and the Scottish Funding Council at: www.sfc.ac.uk Information is also available on the SQA Accreditation (SQA) website, accreditation.sqa.org.uk

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

3 Qualification rationale

Qualification objectives

The SVQ in Retail Skills at SCQF Level 5 is for learners who work in or who want to work in retailing.

The qualification gives learners the opportunity to:

- develop and demonstrate competence in retailing job roles in areas such as health and safety, customer service, sales, finance and administration
- develop technical skills and knowledge and understanding related to the specified retailing job roles such as stock control, customer care, multi-channel retail, product expertise, clothing, food and drink, and DIY
- gain recognition for existing skills and knowledge
- achieve a nationally-recognised SCQF Level 5 qualification
- develop personal growth and engagement in learning.

Relationship with previous qualifications

This qualification is a direct replacement for the 2012 SVQ in Retail Skills at SCQF Level 5, which has expired.

Apprenticeships

The SVQ in Retail Skills at SCQF Level 5 is a mandatory component for the Level 5 Apprenticeship in Retail Modern Apprenticeship.

Progression opportunities

Learners who achieve the SVQ in Retail Skills at SCQF Level 5 can progress to further professional and academic development, for example a Higher National Diploma in Retail Management or employment in the retail sector.

Industry support and recognition

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

Relationship with National Occupational Standards

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

4 Qualification structure

SVQ in Retail Skills at SCQF Level 5

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

Minimum number of credits that must be achieved	32
Number of mandatory units that must be achieved	3
Number of optional units that must be achieved	7

Unit	Unit code	Mandatory units	Credit points	SCQF Level
1	CFACSA4	Give customers a positive impression of yourself and your organisation	5	5
2	PPL.E103	Maintain health and safety procedures in a retail organisation	5	5
3	PPL.E105	Work effectively as part of a team in a retail organisation	9	5
Unit	Unit code	Optional units	Credit points	SCQF Level
Customer Service and Sales				
Candidates must take 7 units (a minimum of 3 units must be at Level 5 or above)				
4	PPL.C204	Help retail customers find products	4	5
5	PPL.C205	Help retail customers choose products	5	6
6	PPL.C206	Identify opportunities to increase sales of particular products	4	6
7	PPL.C207	Promote particular retail products	3	4
8	PPL.C208	Provide information and advice to meet the requirements of retail customers	3	5
9	PPL.C209	Help retail customers resolve complaints	3	5
10	PPL.C221	Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works	2	4

Unit	Unit code	Optional units	Credit points	SCQF Level
11	PPL.C222	Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application	4	5
12	PPL.C223	Check customers' preferences and buying decisions when making retail sales	4	5
13	PPL.C224	Provide assistance at the self-service payment point in a retail organisation	3	5
14	PPL.C280	Demonstrate products to customers in a retail organisation	6	5
15	CFACSD2	Support customer service improvements	5	5
16	CFACSB10	Organise the delivery of reliable customer service	6	6
17	CFACSB11	Improve the customer relationship	7	6
18	CFACSD8	Work with others to improve customer service	8	6
19	PPL.C311	Make and review plans for finding new retail clients	7	6
20	PPL.C312	Market a retail organisation's services to potential clients	7	6
21	PPL.C313	Provide a consultative selling service to retail clients	6	6
22	PPL.C315	Decide on the value of items offered in part-exchange by retail customers	5	6
23	PPL.C316	Negotiate part-exchange sales transactions with retail customers	5	6
24	PPL.C355	Help retail customers to choose specialist products in a retail organisation	7	6
25	PPL.C356	Demonstrate specialist products to customers in a retail organisation	6	6
26	PPL.E314	Monitor the service provided to customers by external suppliers of a retail organisation	4	5

Unit	Unit code	Optional units	Credit points	SCQF Level
Stock				
27	PPL.B201	Prepare to receive deliveries in a retail organisation	5	5
28	PPL.B202	Receive deliveries and check storage arrangements of goods in a retail organisation	8	5
29	PPL.B204	Put goods into storage in a retail organisation	6	5
30	PPL.B205	Check the level of goods on sale in a retail organisation	3	5
31	PPL.B206	Replenish goods on sale in a retail organisation	4	6
32	PPL.B207	Check the availability of goods for customer orders	6	6
33	PPL.B208	Process orders for retail customers	4	5
34	PPL.B245	Pick goods to fulfil customer orders in a retail organisation	3	5
35	PPL.B247	Count stock levels and resolve problems with stock levels in a retail organisation	2	5
36	PPL.B301	Organise staff to receive, check and record incoming deliveries in a retail organisation	12	6
37	PPL.B303	Check the storage and care of stock in a retail organisation	5	6
38	PPL.B304	Organise an audit programme and put it into practice with a team in a retail organisation	8	6
39	PPL.B305	Investigate problems and report the findings of stock audits in a retail organisation	5	6
40	PPL.B306	Choose and contract with suppliers and order stock in a retail organisation	7	6
41	PPL.B307	Check and evaluate the performance of suppliers of stock	7	6

Unit	Unit code	Optional units	Credit points	SCQF Level
42	PPL.E210	Prepare newspapers and magazines for return to the merchandiser	3	5
Product expertise – clothing				
43	PPL.C250	Identify retail customers' requirements for lingerie	2	5
44	PPL.C251	Measure and fit retail customers for lingerie	8	5
45	PPL.C273	Use the dressing room facilities to create sales opportunities	2	6
46	PPL.C274	Keep dressing room facilities ready for customer use	1	4
Product expertise – food and drink				
47	PPL.B220	Bake (bake-off) products for sale in a retail organisation	6	5
48	PPL.B221	Finish bake-off products in a retail organisation	6	5
49	PPL.B224	Prepare greengrocery products for sale in a retail organisation	3	5
50	PPL.B225	Display and maintain greengrocery products to attract sales in a retail organisation	5	5
51	PPL.B226	Quality check the suitability of meat products for finishing in a retail organisation	6	5
52	PPL.B227	Prepare to finish meat products in a retail organisation	5	5
53	PPL.B228	Achieve meat product yield and finish in a retail organisation	5	5
54	PPL.B235	Maintain food safety while working with food in a retail organisation	5	5
55	PPL.B243	Organise your work to meet a dough production schedule in a retail organisation	4	5
56	IMPCB101	Select, weigh and measure ingredients in bakery operations	5	5

Unit	Unit code	Optional units	Credit points	SCQF Level
57	IMPCB105	Divide, mould and shape fermented dough in bakery operations	6	5
58	PPL.B248	Hand-process fish in a retail organisation	6	5
59	PPL.B308	Monitor and contribute to improving food safety in a retail organisation	8	6
60	PPL.C268	Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products	8	6
61	PPL.C275	Promote sales of food or drink products by offering samples to customers and following relevant food safety requirements	3	4
62	PPL.C278	Help customers to choose delicatessen products in a specialist retail organisation	7	5
63	PPL.C279	Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation	6	5
Product expertise – home/DIY				
64	PPL.C262	Establish retail customers' requirements and provide advice regarding tiling products	6	5
65	PPL.C263	Advise customers upon measuring and planning for the fixing of tiles	8	6
66	PPL.C264	Advise customers upon the fixing of their own tiles	8	6
Product expertise – motor fuel				
67	PPL.B238	Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt	7	5

Unit	Unit code	Optional units	Credit points	SCQF Level
68	PPL.B239	Check that driver-controlled fuel transfers have been completed	7	5
69	PPL.B240	Receive deliveries and transfer fuel on a forecourt	8	6
70	PPL.C266	Authorise and monitor the self-service dispensing of motor fuel on a forecourt	5	5
Product expertise – other				
71	PPL.B105	Sort and prepare donated goods in a retail-charity organisation for selling or recycling	4	4
72	PPL.B212	Prepare and assemble products for selling to retail customers	4	5
73	PPL.B246	Assist in loading customer orders for despatch in a retail organisation	2	5
74	PPL.C220	Assemble retail products at customers' premises and assist with installation and initial use	5	6
75	PPL.C253	Demonstrate beauty products to retail customers	6	6
76	PPL.C254	Maintain the retail customer record-card system in a retail organisation	2	5
77	PPL.C267	Maintain a display of cut flowers in a retail organisation that does not specialise in floristry	3	5
78	PPL.C276	Deliver products to customers' premises making the best use of time and resources	6	5
79	PPL.C277	Contribute to monitoring and maintaining ease of shopping in a retail sales area	2	4

Unit	Unit code	Optional units	Credit points	SCQF Level
Visual merchandising				
80	PPL.C201	Prepare display areas and materials in a retail organisation in line with display plans	3	5
81	PPL.C202	Set up and dismantle displays in line with display plans in a retail organisation	3	5
82	PPL.C203	Label displays of stock in a retail organisation	2	4
83	PPL.C230	Interpret design briefs for retail displays	3	5
84	PPL.C231	Source merchandise and props to be featured in retail displays	5	5
85	PPL.C232	Dress in-store retail displays to guidelines	7	5
86	PPL.C233	Dress window displays following a retail organisation's guidelines	6	5
87	PPL.C234	Evaluate and improve retail displays	6	6
88	PPL.C235	Order graphic materials to meet retail display requirements	5	6
89	PPL.C236	Position graphic materials to support retail displays	3	5
90	PPL.C237	Dismantle retail displays	3	4
91	PPL.C238	Store equipment, props and graphics for retail displays	3	5
92	PPL.C244	Follow guidelines for putting retail display layouts together	4	5
93	PPL.C301	Organise staff to display goods for retail sale	4	6
94	PPL.C302	Assess how effective displays are in a retail organisation	4	6
95	PPL.C303	Keep stock available, correctly priced and maintain quality of stock in a retail organisation	3	5

Unit	Unit code	Optional units	Credit points	SCQF Level
96	PPL.C330	Interpret requirements for retail displays	2	5
97	PPL.C331	Choose and agree retail merchandise to be featured in retail displays	3	5
98	PPL.C332	Identify and obtain graphic materials for retail displays	4	6
99	PPL.C333	Co-ordinate how graphic materials are used in retail displays	4	6
100	PPL.C334	Check how graphic materials are used in retail displays	2	5
101	PPL.C335	Gather information about retail customers' responses to displays and layouts	5	6
Finance and administration				
102	PPL.C213	Work out the price of customers' retail purchases	2	4
103	PPL.C214	Provide a payment service at point of sale in a retail organisation	4	5
104	PPL.C215	Process applications from retail customers for credit facilities	5	5
105	PPL.C217	Process payments made to retail customer accounts	4	5
106	PPL.C218	Reconcile retail customers' accounts	4	5
107	PPL.C252	Follow procedures for retail sales of age-restricted products	7	5
108	PPL.C269	Cash up one or more payment registers	4	5
109	PPL.C306	Identify the retail customer's credit or hire-purchase requirements	6	6
110	PPL.C308	Process credit or hire-purchase applications on behalf of retail customers	5	6
111	PPL.E211	Monitor and support secure use of the payment register and service area in a retail organisation	3	5

Unit	Unit code	Optional units	Credit points	SCQF Level
112	PPL.E212	Check the accuracy of records of hours worked in a retail organisation	5	6
Health, safety and security				
113	PPL.E101	Identify and report security risks in a retail organisation	3	5
114	PPL.E102	Identify and seek assistance when accidents and emergencies occur in a retail organisation	3	5
115	PPL.E104	Manually lift and handle goods and materials safely in a retail organisation	3	5
116	PPL.E205	Help maintain security in a retail organisation	5	5
117	PPL.E206	Deal with accidents and emergencies within the limits of your own authority in a retail organisation	4	5
118	PPL.E207	Contribute to reducing risks to health and safety in a retail organisation	4	5
119	PPL.E304	Monitor and maintain security in a retail organisation	5	5
120	PPL.E307	Take a safe and active role when accidents and emergencies occur in a retail organisation	4	5
Management, leadership and people				
121	PPL.E002	Recruit and retain staff in a retail organisation	7	6
122	PPL.E003	Plan and allocate work to staff in a retail organisation	6	6
123	PPL.E302	Recommend, agree and contribute to implementing improvements to retail operations	7	6
124	PPL.E308	Plan staffing levels and prepare work schedules for a retail organisation	6	6
125	PPL.E309	Monitor work targets to make changes in staffing levels in a retail organisation	5	6

Unit	Unit code	Optional units	Credit points	SCQF Level
126	PPL.E337	Help colleagues to learn in a retail organisation	5	6
127	PPL.E338	Manage a team on a temporary basis in a retail organisation	5	6
Multi-channel retailing				
128	PPL.MCR01	Work productively with colleagues in a multi-channel retail organisation	8	6
129	PPL.MCR02	Work with colleagues to encourage innovation in a multi-channel retail organisation	6	6
130	PPL.MCR03	Update product information on a trading website	3	6
131	PPL.MCR05	Provide support to individual retail customers of a trading website	5	6
132	PPL.MCR06	Analyse feedback from retail customers of a multi-channel retail organisation when goods are returned	4	6
133	PPL.MCR07	Manage a social network on a trading website	4	6
134	PPL.MCR15	Use in-store online facilities to achieve retail sales	9	5
135	PPL.MCR16	Advise and support customers in a retail organisation on the use of online retail facilities	7	6
136	PPL.MCR17	Motivate colleagues to promote online retail facilities to retail customers	7	6

Centres should be aware that within the SCQF Level 5 qualification in this specification, learners may be required to meet the demands of units at SCQF Level 6. Centres are advised to consider the support, guidance and opportunities they give to learners to meet the demands of the higher-level units.

5 Programme delivery

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

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

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

Elements of good practice

Learner recruitment, preparation and support

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

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

Training and assessment delivery

Good practice in relation to training and assessment delivery includes:

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

Employer engagement

Good practice in relation to employer engagement includes:

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

6 Centre resource requirements

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

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

7 Access and recruitment

Our policy on access to our qualifications is that:

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

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

Prior knowledge, skills and understanding

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

Access to qualifications for learners with disabilities or specific needs

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

We are committed to making sure that:

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

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

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

8 Assessment

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

Language of assessment

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

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

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

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements and Reasonable Adjustments*. Both documents are on our website.

Internal assessment

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

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

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

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

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

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

Learners can provide evidence of occupational competence from:

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

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

Assessment strategy

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

Types of evidence

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

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

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

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

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

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

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

Appeals

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

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

Dealing with malpractice

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

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

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

Reasonable adjustments to assessment

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

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

Special consideration

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

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

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

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

Both of the documents mentioned above are on our website.

Credit transfer

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

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

9 Centre recognition and approval

Centre recognition

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

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

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

Approvals agreement

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

10 Quality assurance of centres

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

Centres must follow quality assurance requirements for standardisation of assessors and internal verifiers and the monitoring and recording of assessment processes.

Pearson uses external quality assurance procedures to check that all centres are working to national standards. It gives us the opportunity to identify and provide support to safeguard certification and quality standards. It also allows us to recognise and support good practice.

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

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

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

For further details, please go to the document *Pearson Centre Guide to Quality Assurance 2018–2019 Pearson NVQs/SVQs and Competence-based qualifications*.

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

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

11 Units

Unit format

Each unit has the following sections.

Unit title

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

Unit code

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

SCQF level

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

Credit points

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

Unit summary

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

Unit assessment requirements/evidence requirements

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

Keywords

Key terms and concepts that feature in the unit.

Assessment outcomes and standards

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

Knowledge and understanding

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

Performance criteria

The level of competence the learner has to achieve.

Unit 1: Give customers a positive impression of yourself and your organisation

Unit code:	CFACSA4
SCQF level:	5
Credit points:	5

Unit summary

This Standard is part of the Customer Service Theme of Impression and Image.

This Theme covers the Customer Service behaviours and processes that have most impact on the way your customer sees you and your organisation.

Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

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 Standard 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.

Unit assessment requirements/evidence requirements

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

Keywords

listening, hearing, speaking, communicate, positive impression, behaviour, problem solving, behaviours, customer service principles, customer service professional, work with others, customer service language, knowledge, understanding; venue; Wood, timber, sales; merchants; Ticketing; Customer; Communicate; Box Office; Admissions; Visitor

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	your organisation's standards for appearance and behaviour
2	your organisation's guidelines for how to recognise what your customer wants and respond appropriately
3	your organisation's rules and procedures regarding the methods of communication you use when dealing with customers
4	how to recognise when a customer is angry or confused
5	your organisation's standards for timeliness in responding to customer questions and requests for information

Performance criteria

You must be able to:

- | | |
|---|---|
| 1 | <p>Meet your organisation's standards of appearance and behaviour:</p> <ul style="list-style-type: none">• greet your customer respectfully and in a friendly manner• communicate with your customer in a way that makes them feel valued and respected• identify and confirm your customer's expectations• treat your customer courteously and helpfully• keep your customer informed and reassured• adapt your behaviour to respond effectively to different customer behaviour. |
| 2 | <p>Respond appropriately to customers:</p> <ul style="list-style-type: none">• respond promptly to a customer seeking help• choose the most appropriate way to communicate with your customer• check with your customer that you have fully understood their expectations• respond promptly and positively to your customers' questions and comments• allow your customer time to consider your response and give further explanation when appropriate. |
| 3 | <p>Communicate information to customers:</p> <ul style="list-style-type: none">• quickly find information that will help your customer• give your customer information they need about the services or products offered by your organisation• recognise information that your customer might find complicated and check whether they fully understand• explain clearly to your customers any reasons why their expectations cannot be met. |

Unit 2: Maintain health and safety procedures in a retail organisation

Unit code: PPL.E103

SCQF level: 5

Credit points: 5

Unit summary

This standard is about following your retail organisation's procedures for maintaining health and safety whilst working in ways that protects other people. It also covers rest times whilst you are still on your retail organisation's premises.

This standard is for everyone working in a retail organisation.

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

- maintain health and safety procedures in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; protects; protecting; safeguards; safeguarding; works; working.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the types of health and safety risk that can arise in your retail organisation
2	your retail organisation's procedures and relevant legal requirements for reducing health and safety risks as far as possible during work activities
3	how to maintain the health and safety of yourself, customers, visitors and staff during work and rest activities
4	why you are required to follow safe working practices during rest breaks whilst still on your retail organisation's premises
5	what can happen to yourself and to your retail organisation if health and safety procedures are not followed
6	the safety equipment to use and why
7	your retail organisation's procedures for using safety equipment
8	who can provide advice and help when concerned about your ability to work safely

Performance criteria

You must be able to:

1	follow and maintain your retail organisation's procedures and relevant legal requirements for reducing health and safety risks as far as possible during all work activities
2	maintain the health and safety of yourself, customers, visitors and staff during work and rest activities when you are on your retail organisation's premises
3	use safety equipment correctly and in the correct situations
4	obtain advice and help from the right people when concerned about your ability to work safely

Unit 3: Work effectively as part of a team in a retail organisation

Unit code: PPL.E105

SCQF level: 5

Credit points: 9

Unit summary

This standard is about working effectively with your colleagues in your retail organisation to achieve results together. It is about co-ordinating efforts, participating in a team, as well as getting along with colleagues from day to day.

This standard is for all retail team members.

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

- work effectively as part of a team in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; works; working; teamwork; team members.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to keep track of how much work is to be done and how long it is likely to take
2	why and when help should be sought
3	how teams work effectively together
4	what team briefings and meetings there are and when they are held
5	how to participate effectively in team briefing and meetings
6	what your retail organisation's procedures are for forming teams and 'who is who' in each team
7	why help should be offered to colleagues and how to respond positively to requests for help, whenever possible
8	what your team's daily, weekly, monthly and yearly targets are
9	how the relevant law and your retail organisation define discrimination, bullying and harassment
10	your retail organisation's procedures for dealing with discrimination, bullying and harassment
11	why your retail organisation's instructions for safeguarding health and safety must be followed

Performance criteria

You must be able to:

1	ask colleagues promptly and politely for the help and information needed to carry out your duties effectively in your team
2	use your retail organisation's procedures for reporting to team leaders and how teams are formed
3	participate in team briefings and meetings in ways that benefit the team and your retail organisation
4	work effectively to follow your retail team's daily, weekly, monthly and yearly targets
5	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
6	follow relevant legal and your retail organisation's procedures when other team members are not working effectively or fairly to others
7	follow your retail organisation's instructions for safeguarding health and safety during all work activities

Unit 4: Help retail customers find products

Unit code: PPL.C204

SCQF level: 5

Credit points: 4

Unit summary

This standard is about helping retail customers find the product they are looking for. You need to do this in ways that make it more likely that retail customers will buy something immediately and that they will shop with the retail organisation again.

This standard is for all sales personnel.

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

- help retail customers find products.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; helps; helping; finds; finding; locates; locating; items; produce; goods; materials.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how helping retail customers find products promotes immediate sales and longer-term loyalty to your retail organisation
2	your personal responsibility for helping retail customers find products
3	your retail organisation's policies and procedures for offering help to retail customers
4	retail customer behaviours that may show they require help finding products
5	the layout of your retail organisation, products offered and where products are located
6	how to stay informed of changes to the layout of your retail organisation, products in stock and where they are
7	your responsibility for promoting associated or additional products and how to identify suitable times to do this
8	your retail organisation's procedures for finding products for retail customers, and why these should be followed
9	the risks of not monitoring in terms of security, safety and lost sales

Performance criteria

You must be able to:

1	check for and notice retail customers who may need help finding products at all times
2	offer help to retail customers in line with your retail organisation's customer service policy and procedures at all times
3	respond promptly and willingly to retail customers' requests for help in finding products
4	identify what retail customers are looking for from the information they give
5	identify suitable opportunities for telling retail customers about associated or additional products whilst following your retail organisation's customer service standards at all times
6	follow your retail organisation's procedures for finding products for retail customers
7	check for security, safety and potential sales while helping individual retail customers at all times

Unit 5: Help retail customers choose products

Unit code: PPL.C205

SCQF level: 6

Credit points: 5

Unit summary

This standard is about helping retail customers choose products. This means helping retail customers decide whether specific products are suitable for their requirements, as well as helping them choose the most suitable product from a range of options. Retail customers need to be helped with their buying decisions in ways that promote sales.

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

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

- Help retail customers choose products.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; helps; helping; assists; assisting; choosing; items; produce; goods; materials.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	why there is a requirement to promote sales and how helping retail customers to choose products contributes to this
2	your responsibility for selling certain products and their features and benefits
3	why there is a requirement to explain product features and benefits to retail customers in ways that they understand and promote the product
4	how to check and interpret retail customers' responses to explanations
5	how to adapt explanations and respond to questions and comments in ways that promote sales
6	how to encourage retail customers to ask for clarification and more information
7	the risks of not monitoring in terms of security, safety and lost sales

Performance criteria

You must be able to:

1	find out which product features and benefits interest individual retail customers and focus on these when discussing products
2	describe and explain clearly and accurately relevant product features and benefits to retail customers
3	compare and contrast products in ways that help retail customers choose the product that best meets their requirements
4	check retail customers' responses to explanations and confirm their interest in the product
5	encourage retail customers to ask questions and respond to their questions and comments in ways that promote sales and goodwill
6	identify suitable opportunities to tell retail customers about associated or additional products and do so in a way that promotes sales
7	check the surroundings for security, safety and potential sales whilst helping retail customers at all times

Unit 6: Identify opportunities to increase sales of particular products

Unit code: PPL.C206

SCQF level: 6

Credit points: 4

Unit summary

This standard is about identifying opportunities to increase the sales of a particular product using a definite campaign based on research and estimating the increase in sales. This could be based on new or current products. It does not mean just identifying opportunities to promote products as part of normal sales transactions.

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

When you have completed this standard you will have demonstrated your understanding of and ability to:

- identify opportunities to increase sales of particular products.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; identifies; identifying; notices; noticing; spots; spotting; boosts; boosting; increases; increasing; selling.

Glossary

Promotional opportunities – Opportunities to increase sales of a particular product by using a definite campaign. Promotional opportunities are not just opportunities to promote products as part of normal sales transactions.

Assessment outcomes and standards

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

Knowledge and understanding

You need to know and understand:

1	seasonal trends and how they affect opportunities for retail sales
2	the difference between the features and benefits of products
3	how to promote the features and benefits of products to retail customers
4	how to estimate and compare the potential of promotional opportunities to increase retail sales
5	who to approach about promotional opportunities identified

Performance criteria

You must be able to:

1	research promotional opportunities that offer the greatest potential to increase retail sales
2	identify the promotional opportunities and estimate the increase in expected retail sales
3	present promotional opportunities to the right person and gain authority to carry out the retail sales activity
4	fill in the relevant records fully and accurately

Unit 7: Promote particular retail products

Unit code: PPL.C207

SCQF level: 4

Credit points: 3

Unit summary

This standard is about increasing the sales of a particular retail product using a definite campaign and evaluating the sales impact afterwards. It does not mean just promoting retail products as part of normal sales transactions.

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

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

- promote particular retail products.

Unit assessment requirements/evidence requirements

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

Glossary

Promotions – opportunities to increase sales of a particular product by using a definite campaign that you will evaluate afterwards. Promotional opportunities are not just opportunities to promote products as part of normal sales transactions.

Keywords

Retailing; retailers; promotes; promoting; specific; sales; selling; sells; promotions; marketing; markets.

Glossary

Promotions – Opportunities to increase sales of a particular product by using a definite campaign that you will evaluate afterwards. Promotional opportunities are not just opportunities to promote products as part of normal sales transactions.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	techniques for encouraging retail customers to buy the particular retail product being promoted
2	techniques for building retail customers' interest in the particular retail product being promoted
3	the information that is relevant in evaluating the success of promotions, and who requires this information
4	how to evaluate and record the results of promotions

Performance criteria

You must be able to:

1	tell retail customers about particular retail products clearly and follow your retail organisation's customer service standards at all times
2	use promotions of particular retail products to increase retail sales
3	identify and take the most effective actions for converting promotional sales into regular future sales
4	gather relevant and accurate information about the effectiveness of promotions and communicate this information clearly to the correct person
5	record clearly and accurately the results of promotions

Unit 8: Provide information and advice to meet the requirements of retail customers

Unit code: PPL.C208

SCQF level: 5

Credit points: 3

Unit summary

This standard is about listening to retail customers' requirements and providing information and advice to meet those requirements. It does not involve selling directly to retail customers, but does involve treating the retail customer in ways that follow the retail organisation's customer service standards.

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

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

- provide information and advice to meet the requirements of retail customers.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; provides; providing; gives; giving; advises; advising; informs; informing; helps; helping.

Glossary

Information and advice – Examples of information and advice provided to customers might include:

1. finding products in stock
2. ordering products not in stock
3. helping customers to make informed buying decisions
4. helping customers to return goods.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to identify retail customers' requirements for information and advice
2	how to give clear and accurate information and check retail customers understand
3	sources of information about the products and services that your retail organisation offers to retail customers, including information about where products are from, what they consist of and whether they can be recycled after use
4	who to approach for help if it is not possible for you to provide information and advice
5	why it is important to keep retail customers' loyalty and confidence
6	how to maintain retail customers' loyalty and confidence while dealing with requests for information and advice
7	your retail organisation's policy on customer service and how this applies to giving information and advice to retail customers

Performance criteria

You must be able to:

1	acknowledge retail customers' requests for information and advice promptly and politely
2	identify retail customers' requirements for information and advice
3	communicate information and advice to retail customers in ways they can understand
4	provide information and advice to retail customers that is relevant, complete, accurate and up to date
5	check politely that the information and advice provided meets retail customers' requirements
6	find other ways to help retail customers when the information and advice given is not satisfactory
7	refer requests for information or advice to the right person when it is not possible for you to help retail customers

Unit 9: Help retail customers resolve complaints

Unit code: PPL.C209

SCQF level: 5

Credit points: 3

Unit summary

This standard is about helping retail customers resolve complaints and dealing with day-to-day complaints. Retail customers' complaints are usually about the quality of products or, sometimes, service. This standard is not for people who handle complaints as a major part of their job, for example it is not for people working in customer contact centres.

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

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

- help retail customers resolve complaints.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; helps; helping; assists; assisting; sorts out; sorting out; fixes; fixing; complaining; problems.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	why it is important to acknowledge retail customers and their complaints
2	how to manage angry retail customers
3	what your level of responsibility is for sorting out complaints
4	who to refer complaints to when they exceed your level of responsibility
5	how to assess complaints and decide what action to take
6	why it is important to help retail customers resolve complaints where possible
7	your retail organisation's policy concerning returns
8	why it is important to keep retail customers' loyalty and confidence
9	how to keep retail customers' loyalty and confidence when dealing with complaints
10	the relevant legal rights of retail customers and your retail organisation
11	your retail organisation's policy on customer service and how this applies to dealing with complaints
12	your retail organisation's procedures for dealing with complaints

Performance criteria

You must be able to:

1	identify the nature of the complaint from information obtained from retail customers
2	acknowledge retail customers and their complaints clearly and accurately
3	follow legal requirements and your retail organisation's policies and procedures for dealing with complaints
4	help retail customers resolve their complaints where possible
5	refer complaints to the correct person if you are unable to deal with them and explain the referral procedure clearly to retail customers

Unit 10: Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works

Unit code:	PPL.C221
SCQF level:	4
Credit points:	2

Unit summary

This standard is about identifying customers who are not yet members of a retail organisation's loyalty scheme, and explaining to them how the scheme works, the features of it and how they would benefit from being members of the scheme.

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

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

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

- explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; explains; explaining; describes; describing; informs; informing; rewards; reward scheme; schemes.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the features and benefits of your retail organisation's loyalty scheme and how it works
2	the sources of information about the scheme that customers can be informed about
3	why loyalty schemes are important in achieving your retail organisation's commercial aims
4	the specific offers currently available to scheme members
5	how to gain customers' attention and interest
6	how to use suitable questions to gain information about customers and their interest in joining the scheme
7	how to explain to customers about the features and benefits of the scheme
8	how to deal with frequently raised questions and concerns in relation to the scheme

Performance criteria

You must be able to:

1	take suitable opportunities to ask customers if they are members of your retail organisation's loyalty scheme and whether they are interested in joining
2	explain clearly and accurately to customers how joining the scheme would benefit them, including any current special offers relating to the scheme
3	explain clearly to customers the features and benefits of the loyalty scheme and how it works
4	respond positively to any questions or concerns that customers raise
5	provide relevant information to customers to help them decide whether to join the scheme
6	treat customers politely at all times following your retail organisation's customer service standards

Unit 11:

Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application

Unit code: PPL.C222

SCQF level: 5

Credit points: 4

Unit summary

This standard is about recognising when customers are interested in joining your retail organisation's loyalty scheme, gaining their commitment and assisting them to complete the membership application.

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

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

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

- gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; gains; gaining; helps; helping; fills out; filling out; fills in; filling in; applications; forms; commits; applies; applying; committing; rewards; reward schemes; schemes.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to recognise signals that customers are interested in joining your retail organisation's loyalty scheme
2	how to ask customers to sign up for your retail organisation's scheme in a way that encourages them to co-operate willingly
3	how to recognise when you have gained customers' commitment
4	the layout of the membership application form, the questions it asks, and how to assist customers in completing the form accurately
5	the proof of membership your retail organisation provides, and how to prepare this
6	how to correct or replace incorrect proof of membership
7	why it is important to inform customers at what point your retail organisation's loyalty scheme starts

Performance criteria

You must be able to:

1	recognise accurately when customers are interested in joining your retail organisation's loyalty scheme
2	take opportunities to ask customers who are showing signs of interest to sign up for your retail organisation's loyalty scheme
3	assist in completing the membership application accurately with customers, using the information they provide once you have gained their commitment
4	check with customers that their details, as shown on the membership documentation, are correct
5	give customers proof of their membership
6	give application forms to customers who show interest but are not willing to join your retail organisation's loyalty scheme there and then
7	inform customers of any further information they need to know about your retail organisation's loyalty scheme and when it will commence

Unit 12: Check customers' preferences and buying decisions when making retail sales

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

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 13:

Provide assistance at the self-service payment point in a retail organisation

Unit code: PPL.C224

SCQF level: 5

Credit points: 3

Unit summary

This standard is about assisting customers who use self-service payment points in your retail organisation, ensuring customer queues are monitored effectively as well as supporting customers who require help. It is also about observing customers who are acting suspiciously.

This standard is for payment point support staff.

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

- provide assistance at the self-service payment point in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	your retail organisation's procedures for monitoring queues
2	your retail organisation's procedures for the purchase of carrier bags
3	types of suspicious behaviour displayed at the self-service area
4	when colleague assistance is required
5	how to authorise items that are of high value, age restricted or require security tags removing
6	how to reset self-service equipment when errors occur
7	the types of payment accepted at the self-service payment point
8	your retail organisation's procedures for identification of counterfeit payments
9	your retail organisation's procedures for security and housekeeping of the self-service areas

Performance criteria

You must be able to:

1	monitor and manage customer flow at the queuing areas of the self-service payment point area
2	inform waiting customers when payment points become available
3	observe customer behaviour during transactions, being aware of the following: <ul style="list-style-type: none"> • confusion • frustration • suspicious behaviour • age of customers when purchasing age-restricted goods.
4	follow your retail organisation's procedures for dealing with customers when providing assistance for the following: <ul style="list-style-type: none"> • items with security tags • authorisation of age-restricted items • resetting of self-service point after a forced halt of transaction • carrier bag purchases.
5	monitor and report customers who are acting suspiciously in line with your retail organisation's procedures
6	offer additional services to customers in line with your retail organisation's procedures
7	treat customers with respect and in line with your retail organisation's service policy throughout the payment process
8	balance the need to give attention to individual customers with the requirement to acknowledge customers who are waiting for help
9	keep the payment point area free of obstructions and debris

Unit 14: Demonstrate products to customers in a retail organisation

Unit code:	PPL.C280
SCQF level:	5
Credit points:	6

Unit summary

This standard is about demonstrating the features and benefits of products to customers in your retail organisation.

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

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

- demonstrate products to customers in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; demonstrates; demonstrating; shows; showing; items; goods; materials; demonstrations.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how demonstrations can help to promote and sell products in your retail organisation
2	the safety precautions to take before, during and immediately after product demonstrations
3	how to obtain the equipment and products required for demonstrations
4	the difference between 'features' and 'benefits' of products
5	the features and benefits of the products being demonstrated
6	which product features and benefits can be demonstrated and which may need describing to customers
7	how to organise product demonstrations into logical steps and stages and why this is important
8	when and how to provide supporting commentary to help customers understand the features and benefits of the products being demonstrated
9	why it is important to clear equipment and products away promptly and without keeping customers waiting unduly, after a demonstration is finished

Performance criteria

You must be able to:

1	take the necessary safety precautions before, during and immediately after demonstrating products in your retail organisation
2	check that all the equipment and products required are available and ready for use before starting the demonstration
3	present the demonstration in a logical sequence of steps and stages
4	cover all the features and benefits that are required to gain customers' interest
5	provide clear and accurate supporting commentary when required
6	clear equipment and products away promptly and without keeping customers waiting unduly, after the demonstration is finished

Unit 15: Support customer service improvements

Unit code:	CFACSD2
SCQF level:	5
Credit points:	5

Unit summary

This Standard is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

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 Standard 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.

Unit assessment requirements/evidence requirements

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

Keywords

customer service; contact centres; improvements; develop; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how customer experience is influenced by the way service is delivered
2	how customer feedback is obtained
3	how to work with others to identify and support change in the way service is delivered
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

Performance criteria

Use feedback to identify potential customer service improvements

You must be able to:

- | | |
|---|--|
| 1 | gather informal feedback from your customers |
| 2 | use your organisation's procedures to collect feedback from your customers |
| 3 | use the information from your customers to develop a better understanding of their customer service experience |
| 4 | identify ways the service you give could be improved based on information you have gathered |
| 5 | share your ideas for improving customer service with colleagues |

Implement changes in customer service

You must be able to:

- | | |
|----|--|
| 6 | identify a possible change that could be made to improve customer service |
| 7 | present your idea for improving customer service to a colleague with the appropriate authority to approve the change |
| 8 | carry out changes to customer service procedures based on your own idea or proposed by your organisation |
| 9 | keep your customers informed of changes to customer service |
| 10 | give customers a positive impression of changes that have been made |
| 11 | work positively with others to support customer service changes |

Assist with the evaluation of changes in customer service

You must be able to:

- | | |
|----|---|
| 12 | discuss with others how changes to customer service are working |
| 13 | work with others to identify any negative effects of changes and how these can be avoided |

Unit 16:

Organise the delivery of reliable customer service

Unit code: CFACSB10

SCQF level: 6

Credit points: 6

Unit summary

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

Plan and organise the delivery of reliable customer service

You must be able to:

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

Review and maintain customer service delivery

You must be able to:

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

Use recording systems to maintain reliable customer service

You must be able to:

- | | |
|----|--|
| 12 | record and store customer service information accurately following organisational guidelines |
|----|--|

Performance criteria

13	select and retrieve customer service information that is relevant, sufficient and in an appropriate format
14	quickly locate information that will help solve a customer's query
15	supply accurate customer service information to others using the most appropriate method of communication

Unit 17: Improve the customer relationship

Unit code: CFACSB11

SCQF level: 6

Credit points: 7

Unit summary

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

Improve communication with your customers

You must be able to:

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

Balance the needs of your customer and your organisation

You must be able to:

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

Exceed customer expectations to develop the relationship

You must be able to:

- | | |
|----|---|
| 11 | make extra efforts to improve your relationship with your customers |
| 12 | recognise opportunities to exceed your customers' expectations |

Performance criteria

13	take action to exceed your customers' expectations within the limits of your own authority
14	gain the help and support of others to exceed your customers' expectations

Unit 18: Work with others to improve customer service

Unit code: CFACSD8

SCQF level: 6

Credit points: 8

Unit summary

This standard is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

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 partners; supervisors; managers; team leaders. The delivery of excellent customer service depends on your skills and those of others. It involves communicating with each other and agreeing how you can work together to give 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 standard is about how you develop a relationship with others to improve your customer service performance.

Unit assessment requirements/evidence requirements

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

Keywords

Customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; services; products; gambling; venue; Ticketing; Customer; Communicate; Box Office; Admissions; Visitor.

Assessment outcomes and standards

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

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

Performance criteria

Improve customer service by working with others

You must be able to:

- | | |
|---|---|
| 1 | contribute constructive ideas for improving customer service |
| 2 | identify what you have to do to improve customer service and confirm this with others |
| 3 | agree with others what they have to do to improve customer service |
| 4 | co-operate with others to improve customer service |
| 5 | keep your commitments made to others |
| 6 | make others aware of anything that may affect plans to improve customer service |

Monitor your own performance when improving customer service

You must be able to:

- | | |
|---|--|
| 7 | discuss with others how what you do affects customer service performance |
| 8 | identify how the way you work with others contributes towards improving customer service |

Monitor team performance when improving customer service

You must be able to:

- | | |
|----|--|
| 9 | discuss with others how teamwork affects customer service performance |
| 10 | work with others to collect information on the team's customer service performance |
| 11 | identify with others how customer service teamwork could be improved |
| 12 | take action with others to improve customer service performance |

Unit 19: Make and review plans for finding new retail clients

Unit code: PPL.C311

SCQF level: 6

Credit points: 7

Unit summary

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

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

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

- make and review plans for finding new retail clients.

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 20: **Market a retail organisation's services to potential clients**

Unit code: PPL.C312

SCQF level: 6

Credit points: 7

Unit summary

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

This standard is for owners, managers, department managers and team leaders. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Knowledge and understanding

14	how to record information about potential clients so that it can be used effectively
15	why client confidentiality is important to the business relationship
16	relevant aspects of the relevant data protection laws and your retail organisation's policy to do with client confidentiality

Performance criteria

You must be able to:

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

Unit 21: Provide a consultative selling service to retail clients

Unit code: PPL.C313

SCQF level: 6

Credit points: 6

Unit summary

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

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

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

- provide a consultative selling service to retail clients.

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Knowledge and understanding

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

Performance criteria

You must be able to:

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

Unit 22: **Decide on the value of items offered in part-exchange by retail customers**

Unit code:	PPL.C315
SCQF level:	6
Credit points:	5

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

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

Unit code:	PPL.C316
SCQF level:	6
Credit points:	5

Unit summary

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

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

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

- negotiate part-exchange sales transactions with retail customers.

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 24: Help retail customers to choose specialist products in a retail organisation

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

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Knowledge and understanding

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

Performance criteria

You must be able to:

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

Unit 25: Demonstrate specialist products to customers in a retail organisation

Unit code:	PPL.C356
SCQF level:	6
Credit points:	6

Unit summary

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

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

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

- demonstrate specialist products to customers in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 26: Monitor the service provided to customers by external suppliers of a retail organisation

Unit code: PPL.E314

SCQF level: 5

Credit points: 4

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 27:

Prepare to receive deliveries in a retail organisation

Unit code: PPL.B201

SCQF level: 5

Credit points: 5

Unit summary

This standard is about preparing to receive deliveries of goods and materials in your retail organisation. This involves checking the receiving and storage areas, the handling equipment and the relevant paperwork.

This standard is for staff who regularly receive deliveries.

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

- prepare to receive deliveries in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; preparation; receiving; delivery; stocks; items; products; goods; materials; produce; storage; stores; storing.

Glossary

Goods and materials – Retail goods for sale and your retail organisation's materials such as consumables and equipment etc.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	why you must prepare thoroughly before receiving deliveries of goods and materials in your retail organisation
2	the information required about the quantity and nature of deliveries, and how to access and interpret this information
3	how to identify the quantity and type of storage space needed, and how to check if this is available
4	who to tell about any shortage of storage space, and why this should be done promptly
5	your retail organisation's procedures for receiving deliveries
6	why accurate, complete and up-to-date paperwork is required, and the possible consequences of not having this
7	the documentation or records that must be checked and how to identify problems with them
8	the legal and your retail organisation's requirements for maintaining security and safety during deliveries, and how these relate to the preparations for receiving goods and materials

Performance criteria

You must be able to:

1	identify accurately the quantity and nature of the goods and materials that are expected and the storage space required
2	check accurately the storage space that is available and promptly report any shortage to the correct person in your retail organisation
3	check that the receiving area is clean, tidy and free from obstructions and dangers
4	check that any handling equipment required is available and is in good working order
5	check that the relevant paperwork is complete, accurate and up-to-date

Unit 28: Receive deliveries and check storage arrangements of goods in a retail organisation

Unit code:	PPL.B202
SCQF level:	5
Credit points:	8

Unit summary

This standard is about receiving deliveries, checking goods, refusing them if they are faulty and updating the stock control systems and records. These records can be electronic/digital or paper based. This standard is also about ensuring the storage arrangements are suitable and locations are fit for purpose. This standard does not involve physically moving deliveries into storage.

This standard is for all staff who receive deliveries and check storage arrangements for goods in a retail organisation.

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

- receive deliveries and check storage arrangements of goods in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; receives; receiving; accepts; accepting; verifies; verifying; delivery; stocks; items; products; goods; materials; produce.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	your retail organisation's requirements for checking the type, quantity and quality of goods received
2	your retail organisation's requirements for dealing with incorrect or damaged goods
3	why and how goods must be handled safely, hygienically and without damage to them
4	what your retail organisation's requirements are for removing goods from delivery vehicles
5	what your retail organisation's requirements are for updating stock records and systems
6	how to check that suitable storage locations and arrangements are available and fit for purpose
7	who to report to if storage locations are insufficient
8	the handling equipment used for storing goods and how to check it is available to use
9	where deliveries of goods should be placed after being removed from delivery vehicles
10	the relevant legal requirements for maintaining security and safety while receiving deliveries
11	your retail organisation's requirements for maintaining security and safety while receiving deliveries

Performance criteria

You must be able to:

1	check that the type, quantity and quality of goods received are acceptable
2	follow your retail organisation's procedures for refusing incorrect or damaged deliveries
3	record any refusals accurately and tell the correct person about them promptly
4	check deliveries using methods that are safe and that protect the goods from damage or contamination
5	follow your retail organisation's procedures for goods to be removed from delivery vehicles and placed in the allocated holding or storage areas
6	update stock control systems promptly and accurately
7	identify storage arrangements and conditions for goods received into storage
8	check that suitable storage locations are available and fit for purpose
9	inform the correct person immediately when storage locations are insufficient
10	check that suitable handling equipment is available for use
11	follow relevant legal requirements for maintaining safety and security when receiving goods into storage
12	follow your retail organisation's procedures for maintaining safety and security when receiving goods into storage

Unit 29:

Put goods into storage in a retail organisation

Unit code: PPL.B204

SCQF level: 5

Credit points: 6

Unit summary

This standard is about storing goods in the right places so that they are safe and secure and can be reached when required. It can involve handling goods manually as well as using lift trucks in a retail organisation.

This standard is for staff who have responsibility for placing goods into storage manually and/or using safe and maintained lifting equipment.

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

- put goods into storage in a retail organisation.

Important safety requirement

Current Health and Safety Executive's (HSE) requirements and Approved Codes of Practice for operators must be followed when using fork lift trucks.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; move; moving; puts; putting; stores; storing; stocks; items; products; produce.

Glossary

Goods – this includes your retail organisation's consumables such as equipment and materials as well as retail goods for sale.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the relevant legal requirements for storing deliveries of goods safely, securely and hygienically
2	your retail organisation's requirements for storing deliveries safely, securely and hygienically
3	why goods need to be rotated
4	how to position goods so that batches of stock can be reached easily and in the right order
5	your retail organisation's requirements for using available storage space safely
6	your retail organisation's requirements for housekeeping of storage areas
7	the current Health and Safety Executive (HSE) requirements and your retail organisation's health and safety requirements for using lifting equipment
8	the instructions required for storing goods in the correct places and in the correct order
9	where to get instructions for storing goods
10	how to work safely, securely and efficiently when putting goods into storage
11	how to recognise when equipment is faulty and how to report it if it is not within your own authority to repair it
12	what, when and how to complete your retail organisation's paperwork or records

Performance criteria

You must be able to:

1	put goods in the right storage facilities within the time expected by your retail organisation
2	follow relevant legal requirements for storing deliveries of goods safely, securely and hygienically
3	follow your retail organisation's requirements for storing deliveries of goods safely, securely and hygienically
4	use lifting equipment safely and in accordance with current HSE approved codes of practice and your retail organisation's health and safety procedures
5	position goods in the correct storage locations so that they can be easily identified and reached when required
6	use your retail organisation's stock rotation system
7	use the available storage space safely and follow relevant housekeeping procedures
8	identify faulty equipment within your area of responsibility
9	report promptly and to the correct person any faulty equipment that is not within your area of responsibility or ability to repair
10	follow your retail organisation's requirements for completing relevant paperwork or records

Unit 30: Check the level of goods on sale in a retail organisation

Unit code: PPL.B205

SCQF level: 5

Credit points: 3

Unit summary

This standard is about using a stock control system to record and check the level of goods on sale in a retail organisation.

This standard is for all staff involved in checking levels of goods on the sales floor.

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

- check the level of goods on sale in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; checks; checking; stocking; stocks; goods; products; items; produce; materials; stocktaking; inventorying.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	why your retail organisation needs to hold the correct levels of goods on sale
2	why the quality and quantity of goods on sale need to be checked regularly
3	the maximum and minimum levels of goods that need to be on sale
4	the factors that can affect demand for goods, and how to work out how often to check levels of goods on sale
5	how to ensure goods are checked at suitable intervals
6	how to use the stock control system to identify current levels, what is required and shortfalls in goods on sale
7	how to identify unsaleable goods
8	how to process unsaleable goods
9	how to update the stock control system

Performance criteria

You must be able to:

1	use your retail organisation's stock control system to identify current levels, what is required and shortfalls in goods on sale
2	use your retail organisation's procedures for checking minimum and maximum levels of goods on sale
3	work out how often to check goods on sale so that there will be enough time to replace them before they run out
4	follow your retail organisation's procedures for checking the level of goods on sale at required intervals
5	tell the correct person promptly when goods need replacing
6	follow your retail organisation's requirements for reporting or recording when goods are no longer saleable

Unit 31: Replenish goods on sale in a retail organisation

Unit code: PPL.B206

SCQF level: 6

Credit points: 4

Unit summary

This standard is about replenishing goods on sale in a retail organisation by ordering new supplies of goods from the stores area, preparing goods for sale, placing goods in relevant places, rotating goods and checking demand for goods.

This standard involves using a stock control system. This standard is for all staff who replenish and order goods from the stores area for sale in a retail organisation.

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

- replenish goods on sale in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; checks; checking; stocking; stocks; goods; products; items; produce; materials; replenishes; replenishing; replenishment; shelf filling; facing up.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to use the stock control system to identify the types and quantities of goods to order for sale in your retail organisation
2	how to prepare and send orders for goods, and why this should be done accurately and at the right times
3	how to prepare different types of goods for sale in your retail organisation
4	how to decide when to move goods to the sales floor and the arrangements to make for moving goods
5	your retail organisation's procedures for replenishing various types of goods
6	your retail organisation's procedures for using display fixtures and equipment safely and securely
7	your retail organisation's procedures for recycling packaging waste
8	why goods need rotating
9	how to rotate goods correctly and without disturbing customers and staff any more than required
10	why your retail organisation's stock control systems need to be accurately updated
11	why demand for goods should be regularly checked
12	factors that can affect demand
13	who to approach with suggestions for changes to the levels of goods carried

Performance criteria

You must be able to:

1	order sufficient goods to maintain the correct levels of goods on sale
2	prepare goods for sale within the time allowed
3	arrange for goods to be moved to the sales floor when it is required
4	follow your retail organisation's procedures for replenishing various types of goods on sale
5	use your retail organisation's display fixtures and equipment safely ensuring goods are secure
6	rotate goods correctly and with the least possible disturbance to customers and staff
7	follow your retail organisation's procedures for recycling packaging waste
8	update your retail organisation's stock control system
9	notice changes in demand for goods and decide what levels are suitable
10	recommend changes in goods ordering to suit demand

Unit 32:

Check the availability of goods for customer orders

Unit code: PPL.B207

SCQF level: 6

Credit points: 6

Unit summary

This standard is about identifying customers' specific requirements for goods they want to order and checking the availability of the goods from suppliers and on which terms they will be supplied. This can include face-to-face, over the phone or online requests by customers. It is also about keeping customers informed.

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

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

- check the availability of goods for customer orders.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; checks; checking; verifies; verifying; available; stocks; products; items; produce; materials.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to ask the correct questions to find out exactly what customers want
2	which goods are held in stock
3	how to check whether there are sufficient goods to meet the order
4	which goods are available to order and which suppliers and manufacturers can provide them
5	how to check whether external suppliers and manufacturers can provide goods, and on what terms
6	why customers need to be kept informed of progress in finding the goods they require
7	how to let customers know when orders cannot be fulfilled
8	ways to advise customers of alternatives or other suppliers
9	why customers must be given clear, accurate and complete information about the terms of supply

Performance criteria

You must be able to:

1	identify goods that will meet customers' requirements and check with customers that these are satisfactory
2	identify customers' requirements accurately by asking open questions to get correct details
3	find out who can supply the goods required and on what terms
4	check the availability of goods so customers' orders can be fulfilled
5	keep customers informed of progress in finding the goods they require
6	let customers know when orders cannot be met
7	suggest alternatives or other suppliers of goods
8	give customers clear, accurate and complete information about the availability of goods and the terms of supply

Unit 33: Process orders for retail customers

Unit code: PPL.B208

SCQF level: 5

Credit points: 4

Unit summary

This standard is about processing retail customer orders, processing goods to be picked and sent out, and arranging payments. This standard includes the relevant legalities of customer credit and customer data sharing when authorising payment and collecting customer information.

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

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

- process orders for retail customers.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; processing; ordering; stocks; items; products; produce; materials; goods.

Glossary

Organisation policy – This may be a set of principles, procedures or both. These may be written or not, however owners and managers need to be clear to all personnel about what procedures should be followed and when.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the relevant legal procedures for checking your retail customers' identity, preferred payment options and credit status, and why procedures should be followed
2	your retail organisation's procedures for collecting additional information
3	who is responsible for fulfilling your retail customers' orders, what information they require and why they require it
4	who is responsible for processing payments for your retail customers for orders, what information they require, and why they require it
5	who to tell if an order cannot be processed
6	why your retail customers should be informed promptly about delays in fulfilling orders
7	why your retail customers should be informed if orders cannot be fulfilled
8	the relevant legal and your organisation's requirements relating to retail customer confidentiality and what the penalties are if retail customers' information is not kept confidential
9	your retail organisation's procedures for storing retail customers' information securely
10	who is entitled to see your retail customers' information, and in what situations

Performance criteria

You must be able to:

1	follow relevant legal procedures for checking your retail customers' identity payment preference and credit status if necessary
2	follow your retail organisation's procedures for checking your retail customers' details and additional information
3	follow your retail organisation's procedure for processing payments for orders
4	follow your retail organisation's policy for offering to order goods your retail customer requires if they are not in stock
5	complete information about orders and pass this information promptly to the people responsible for fulfilling orders
6	process orders for picking from stock held in your retail organisation
7	follow your retail organisation's procedures for arranging order(s) to be sent out
8	let your retail customer know promptly if their order cannot be fulfilled within the time agreed
9	store your retail customers' details securely and show them only to people who have a right to see them

Unit 34:

Pick goods to fulfil customer orders in a retail organisation

Unit code: PPL.B245

SCQF level: 5

Credit points: 3

Unit summary

This standard is about providing a service to customers by picking goods from stock in response to their orders. Personnel may be picking from a shop floor display or within a storage area of the retail organisation. This standard is for retail organisations using it as part of its 'dot.com' online service or for other retail organisations who use it as an additional service to its customers. It is also about being able to pick out alternatives if the goods customers require are not available.

This standard is for sales and retail stores personnel who are employed to fulfil orders or as part of their sales role.

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

- pick goods to fulfil customer orders in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; picking; picks; internet; loads; loading; online shopping; online.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	what documentation or records to check for customers' orders
2	the layout of the display area or storage area and how to work out the most efficient routes for picking customers' orders
3	why it is important to try not to inconvenience other staff or customers during picking activities
4	how to pick goods in ways that cause the least possible inconvenience to other staff or customers whilst ensuring that orders are picked within the required time
5	how to interpret picking instructions and who to ask for advice if picking instructions are unclear
6	what counts as 'saleable quality' for the goods and how to check the quality of the goods as they are being picked
7	the common types of damage and deterioration that can affect goods during picking, and how to prevent these
8	your retail organisation's procedures for recording picked goods and prices
9	your retail organisation's policy and procedures for choosing alternatives when the goods requested by customers are not in stock
10	how to avoid mixing up orders when picking for more than one customer
11	how to pack goods so as to keep them in saleable condition without using excessive amounts of packaging
12	where to put customers' packed orders ready for collection or despatch

Performance criteria

You must be able to:

1	check customers' order details and relevant records
2	plan a route around the display area or storage area that is efficient and that enables goods to be picked within the time allowed
3	pick goods in ways that minimise the inconvenience caused to other staff or customers whilst ensuring that goods are picked within the required time
4	ask the correct person for advice if picking instructions are unclear
5	check that the goods picked are of saleable quality
6	protect picked goods from damage and deterioration throughout the picking process
7	follow your retail organisation's procedures for recording picked goods and prices
8	follow your retail organisation's policy and procedures for choosing alternatives when goods requested by customers are not in stock
9	use effective methods for separating goods for different orders when picking for more than one customer
10	pack goods so as to keep them in saleable condition without using excessive packaging
11	put customers' packed orders in the correct places ready for collection or despatch

Unit 35: Count stock levels and resolve problems with stock levels in a retail organisation

Unit code:	PPL.B247
SCQF level:	5
Credit points:	2

Unit summary

This standard is about maintaining stock levels so that sales are not lost because stock was not available for sale. It is about counting stock and identifying and resolving problems with quality or insufficient stock.

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

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

- count stock levels and resolve problems with stock levels in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; checks; checking; stocks; stocktaking; problem solving; solves; sorts; resolves; rectifies.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how accurate stock counting contributes to maintaining stock levels and to customer satisfaction and sales
2	how to find out what stock must be counted and when to count it
3	your retail organisation's procedures for counting stock and recording stock levels, including relevant health and safety procedures
4	your retail organisation's procedures for noting problems with stock levels
5	why it is important to minimise disturbance to other staff and customers when counting stock, and how to do so
6	the problems with stock and stock levels within your area of responsibility and the procedures for resolving problems
7	who to tell about problems with stock and insufficient stock levels not in your area of responsibility

Performance criteria

You must be able to:

1	follow relevant instructions for counting stock in the right areas of the store and at the right times
2	follow your retail organisation's procedures for counting stock and recording stock levels
3	follow your retail organisation's procedures for identifying problems with the quality of stock and stock levels
4	follow your retail organisation's procedures for safeguarding the health and safety of yourself and other staff or customers whilst counting stock
5	minimise the disturbance when it is necessary to disturb other staff or customers in order to count stock accurately and within the time allowed
6	resolve problems with the quality of stock and insufficient stock levels when authorised to, promptly and in line with your retail organisation's procedures
7	tell the correct person about any problems with the quality of stock and stock levels not in your area of responsibility

Unit 36: Organise staff to receive, check and record incoming deliveries in a retail organisation

Unit code:	PPL.B301
SCQF level:	6
Credit points:	12

Unit summary

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

This standard is for owners, managers and team leaders.

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 37: Check the storage and care of stock in a retail organisation

Unit code: PPL.B303

SCQF level: 6

Credit points: 5

Unit summary

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

This standard is for owners, managers and team leaders.

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 38: Organise an audit programme and put it into practice with a team in a retail organisation

Unit code:	PPL.B304
SCQF level:	6
Credit points:	8

Unit summary

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

This standard is for owners, managers and team leaders.

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 39: Investigate problems and report the findings of stock audits in a retail organisation

Unit code: PPL.B305

SCQF level: 6

Credit points: 5

Unit summary

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

This standard is for managers and team leaders.

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

- investigate problems and report the findings of stock audits in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 40: Choose and contract with suppliers and order stock in a retail organisation

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

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 41: Check and evaluate the performance of suppliers of stock

Unit code: PPL.B307

SCQF level: 6

Credit points: 7

Unit summary

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

This standard is for owners, managers and team leaders.

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

- check and evaluate the performance of suppliers of stock.

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 42: Prepare newspapers and magazines for return to the merchandiser

Unit code:	PPL.E210
SCQF level:	5
Credit points:	3

Unit summary

This standard is about preparing unsold newspapers and magazines for return to the merchandiser so your retail organisation can receive the credit owed for unsold items. This standard is for owners, managers, department managers, team leaders and sales/customer service staff.

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

- prepare newspapers and magazines for return to the merchandiser.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; prepares; preparing; preparation; returns; returning.

Glossary

Documentation – ‘Documentation’ can mean either paper records or computer records.

File [documentation] – ‘File documentation’ can mean either filing paper records or storing records on a computer.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	why it is important to return unsold newspapers and magazines promptly and in line with your retail organisation's procedures
2	the agreed collection times for returns with the merchandiser
3	how to organise your work so that returns for collection are ready by the agreed times
4	what information is required to enable preparation of returns, where to get this information and how to interpret it
5	the required order for stacking returns
6	the materials and methods to use for wrapping returns securely and with minimum waste
7	the information that needs to appear on labels for returns
8	the safe lifting and handling procedures
9	where to put returns ready for collection
10	the documentation required to complete a return and how to complete it
11	where to file and record returns documentation
12	your retail organisation's procedures for dealing with missed returns and returns that aren't collected by the merchandiser

Performance criteria

You must be able to:

1	allow enough time to prepare returns of unsold newspapers and magazines by the agreed collection time
2	use relevant information to select those items that need returning
3	safely stack returns in the required order
4	wrap returns using methods that protect items adequately and minimise wastage of wrapping materials
5	label returns clearly with all the required information
6	follow relevant legislation and your retail organisation's procedures for safely lifting and handling newspaper and magazine piles for return
7	put returns in the agreed place ready for collection
8	complete returns documentation correctly with all the required information
9	file returns documentation and use recording systems correctly
10	follow your retail organisation's procedures for dealing with missed returns and those that are not collected by the merchandiser

Unit 43:

Identify retail customers' requirements for lingerie

Unit code: PPL.C250

SCQF level: 5

Credit points: 2

Unit summary

This standard is about explaining the lingerie-fitting service and finding out what type of lingerie your retail customers require, sometimes when they are unclear about their own requirements.

This standard is for sales staff who may or may not conduct lingerie fitting as part of their responsibility. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- identify retail customers' requirements for lingerie.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; identifies; identifying; finds out; finding out; works out; working out; requirements; customers; bras.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to approach retail customers in the lingerie department
2	how to use information offered by retail customers to identify their requirements
3	what is involved in the lingerie-fitting service and how long a fitting session is likely to take
4	questioning techniques used to clarify and agree retail customers' buying requirements
5	how to build trust and relax retail customers using the lingerie-fitting service
6	how to talk to different types of retail customers and help them to understand the information provided

Performance criteria

You must be able to:

1	approach retail customers in the lingerie department and accurately identify what their requirements are from the information given
2	describe accurately to retail customers the process and benefits of the lingerie-fitting service
3	offer retail customers the lingerie-fitting service or, if the retail customer prefers, book a later appointment

Unit 44: Measure and fit retail customers for lingerie

Unit code: PPL.C251

SCQF level: 5

Credit points: 8

Unit summary

This standard is about carrying out the lingerie-fitting service, including measuring and fitting retail customers and helping them to choose suitable lingerie products. It can include specialist support for retail customers who have special requirements, including:

- disability
- mastectomy
- minors or customers with limited mental capacity
- gender realignment.

It also covers the relevant legislation related to equality and diversity as well as dealing with minors. This standard is for staff who conduct lingerie fitting as part of their role. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- measure and fit retail customers for lingerie.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; measures; measuring; sizes; sizing; fits; fitting; customers; bras.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	basic styles, shapes and sizes of lingerie
2	the different parts of lingerie and their technical names
3	brands, colours, fabrics, trims and price range of available products
4	the size, range and fit of the lingerie in stock and where different types of lingerie can be found
5	the features, advantages and benefits of different types of lingerie
6	the ordering service using in-house systems or brand catalogues for lines either not in stock or not carried by your retail organisation
7	solution dressing – what to wear under different outfits
8	accessories such as enhancers and co-ordinating garments
9	the manufacturer's guidance on washing and caring for products
10	scheduled delivery dates for new products
11	trends in design, technological solutions and fabrics
12	how to assess the retail customer's body size and age
13	the equipment and layout required for the lingerie fitting room

Knowledge and understanding	
14	how and where to measure for the retail customer's band size using a tape measure
15	how to estimate the cup size required
16	how to choose the correct lingerie for the fitting
17	how to educate the retail customer on band sizes, cup sizes and correct fitting using the lingerie chosen
18	body shapes and breast sizes
19	what special requirements a range of retail customers may have
20	how to adjust and fit the lingerie both inside and outside the fitting room
21	how to build trust and relax retail customers whilst working with them
22	how to talk to different types of retail customers and help them understand the information provided
23	how to deal with challenging situations, including unusual body shape, body odour, disability, mastectomy and maternity
24	the importance of retail customers' confidence and loyalty to your retail organisation and how to contribute to them
25	the relevant legal and your retail organisation's requirements when dealing with retail customers with special requirements

Performance criteria

You must be able to:

1	follow your retail organisation's customer service standards at all times with retail customers while assessing their measuring and fitting requirements
2	explain clearly and tactfully to retail customers that an accurate fit cannot be guaranteed if measurements are taken on top of the retail customers' clothing
3	follow your retail organisation's and relevant legal requirements when dealing with retail customers with special requirements
4	position yourself and the retail customers correctly so that: <ul style="list-style-type: none">• measurements can be taken accurately• the product can be adjusted to fit retail customers• retail customers can see the product when worn and correctly fitted.
5	meet the retail customers' requirements for privacy and help while they are trying products on
6	take and record the required measurements accurately
7	choose accurately and offer a range of products in the retail customer's size and that meet retail customers' requirements
8	adjust and fit products to provide retail customers comfort and prolong the life of the products
9	check the fit of the products and whether retail customers are satisfied with the product
10	explain other possible courses of action if lingerie cannot be found to fit retail customers

Unit 45: Use the dressing room facilities to create sales opportunities

Unit code: PPL.C273

SCQF level: 6

Credit points: 2

Unit summary

This standard is about using the dressing room facilities to create sales whilst assisting customers and making them feel valued. It is also about ensuring security and minimising stock losses.

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

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

- use the dressing room facilities to create sales opportunities.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; uses; using; dressing rooms; changing rooms; fitting rooms; sells; selling.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how many dressing rooms there are and what other facilities are available
2	when a dressing room is likely to be busy and needs to be open and when it is not so it can be closed
3	why approaching customers on the sales floor and offering use of the dressing room facilities can create sales opportunities
4	how to greet customers in a welcoming manner
5	your retail organisation's policy on checking how many items are being taken into the dressing room facilities and how to deal with customers who dispute the policy
6	how to keep up to date about in-store offers and promotions and how to advise customers about them
7	how to engage customers in conversation in order to create sales opportunities
8	how informing customers about special offers and promotions can lead to sales opportunities
9	how suggesting matching items and accessories can lead to sales opportunities
10	how to monitor customers entering and leaving the dressing rooms so none remain empty whilst customers are waiting
11	your retail organisation's procedures for dealing with suspected stock loss
12	the right person to contact if stock loss is suspected
13	how to check whether alternative dressing room areas are available at busy times

Knowledge and understanding

You must be able to:

1	monitor the sales floor for customers who may be interested in trying clothes on
2	approach customers in the sales area to offer use of the dressing room facilities with a view to creating sales opportunities
3	welcome customers in a friendly manner when they approach the dressing room
4	check how many items are being taken into the dressing room, and follow your retail organisation's policy for restricting the number of items when necessary
5	advise the customer politely but firmly of your retail organisation's policy regarding how many items of clothing are allowed in a dressing room at any one time and deal with any disputes
6	let customers know how to get further help if required
7	inform customers about special offers and promotions to help create sales opportunities
8	suggest matching items and accessories to help create sales opportunities
9	keep track of the number of dressing rooms that are in use whilst carrying out other duties
10	check politely that customers have brought all the items of clothing out of the dressing room that they took into it in case of any discrepancies
11	follow your retail organisation's procedures promptly on how to deal with possible stock loss if there is a discrepancy
12	acknowledge customers who are waiting to use the dressing room and direct them to alternative facilities if these are available

Unit 46: Keep dressing room facilities ready for customer use

Unit code: PPL.C274

SCQF level: 4

Credit points: 1

Unit summary

This standard is about keeping dressing room facilities ready for customers to use. Confidentiality, security and safety are important aspects of this standard. This will create a positive image of your retail organisation.

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

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

- keep dressing room facilities ready for customer use.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; keeps; keeping; maintains; maintaining; dressing rooms; changing rooms; fitting rooms; uses; using; cleans; cleaning; tidies; tidying.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	why it is important to keep the dressing room facilities clean, tidy and in good working order
2	why dressing room facilities should always be ready for customers' use
3	your retail organisation's standards for the cleanliness, tidiness and hygiene of the dressing room facilities
4	who can help to resolve problems with the dressing room facilities that are outside of your authority
5	where cleaning materials are kept and how to clean the dressing room facilities safely and effectively
6	how to routinely check in a discreet manner that the dressing rooms are clean and tidy, whilst customers are using the area
7	where to store unsold merchandise before preparing it for return to the shop floor
8	how to prepare merchandise for return to the shop floor
9	how to recognise merchandise that is no longer of saleable quality
10	your retail organisation's procedures for dealing with merchandise that is no longer of saleable quality

Performance criteria

You must be able to:

1	check dressing room facilities before opening to ensure they are ready for customers to use, in line with your retail organisation's standards for cleanliness, tidiness and hygiene
2	clean and tidy dressing rooms as required, using suitable equipment and materials and safe and effective procedures
3	report to the correct person any problems with the dressing room facilities that you cannot resolve
4	whilst the dressing room facility is open, regularly and discreetly check that the dressing rooms are clean, tidy and free from obstructions in line with your retail organisation's safety and security policies to ensure they are always ready to use
5	place merchandise in the designated area when it cannot be returned to the shop floor immediately
6	prepare unsold merchandise for prompt return to the shop floor
7	follow your retail organisation's procedures for dealing with merchandise that is no longer of saleable quality

Unit 47: Bake (bake-off) products for sale in a retail organisation

Unit code: PPL.B220

SCQF level: 5

Credit points: 6

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

Bake [baking methods] – oven work

Legal and organisation requirements:

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

Products:

Fermented products can include:

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

Non-fermented products can include:

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 48: Finish bake-off products in a retail organisation

Unit code:	PPL.B221
SCQF level:	5
Credit points:	6

Unit summary

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

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

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

- finish bake-off products in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

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

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

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

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

Legal and organisation requirements:

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

Products:

Fermented products can include:

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

Non-fermented products can include:

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 49: Prepare greengrocery products for sale in a retail organisation

Unit code: PPL.B224

SCQF level: 5

Credit points: 3

Unit summary

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

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

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

- prepare greengrocery products for sale in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

Greengrocery products:

1. vegetables
2. fruit
3. salad

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 50: Display and maintain greengrocery products to attract sales in a retail organisation

Unit code: PPL.B225

SCQF level: 5

Credit points: 5

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

Display areas:

1. shelves
2. chillers
3. displays.

Greengrocery products:

1. vegetables
2. fruit
3. salad.

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 51:

Quality check the suitability of meat products for finishing in a retail organisation

Unit code: PPL.B226

SCQF level: 5

Credit points: 6

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

Products:

1. meat
2. poultry
3. ingredients.

Product quality and suitability checks:

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 52: Prepare to finish meat products in a retail organisation

Unit code: PPL.B227

SCQF level: 5

Credit points: 5

Unit summary

This standard is about preparing to finish meat products in a retail organisation. It involves following your retail organisation's instructions and using safe and hygienic working practices. It is also about preparing and maintaining tools and equipment. This standard is for all staff who finish meat products in a meat department of a retail organisation or independent butchery store.

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

- prepare to finish meat products in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; prepares; preparing; preparation; finishes; finishing; butchery; butchers; butchering; poultry.

Glossary

Processing [needs/requirements]:

1. organisation policies for storing and preparing ingredients and products
2. procedures for processing meat products
3. instructions for carrying out specifications
4. organisation policies for storing tools and equipment.

Safe and hygienic working practices:

1. using checking procedures
2. maintaining personal hygiene
3. using personal protective clothing and equipment.

Safety [needs/requirements]:

1. UK and NI laws
2. codes of practice and guidance notes.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the dangers associated with butchery tools and equipment and the safety precautions to take
2	why it is important to use the correct processes for storing and using tools and equipment
3	which tools and equipment are used for finishing meat products in your retail organisation
4	reasons for preparing tools and equipment
5	how to keep tools and equipment clean and in good working order
6	how to prepare knives and keep them sharp and in good working order using safe and hygienic working practices
7	what to do about faulty tools and equipment
8	how to prepare a range of meat products for finishing in your retail organisation

Performance criteria

You must be able to:

1	obtain your retail organisation's instructions for finishing meat products and organise your work in line with them
2	keep the work area free from dangers and prepare and organise it to meet your retail organisation's safety and processing needs
3	choose butchery tools that are appropriate for the task
4	prepare tools and equipment in line with your retail organisation's safety and processing requirements
5	identify faulty tools and equipment and follow your retail organisation's procedures for dealing with them
6	follow your retail organisation's safe and hygienic working practices when preparing meat products for finishing at all times

Unit 53: **Achieve meat product yield and finish in a retail organisation**

Unit code: PPL.B228

SCQF level: 5

Credit points: 5

Unit summary

This standard is about finishing meat products to achieve the yield and finish required.

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

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

- achieve meat product yield and finish in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; finishes; finishing; butchery; butchers; butchering; poultry.

Glossary

Products:

1. meat
2. poultry
3. ingredients.

Product specification:

1. yield
2. finish.

Safe and hygienic working practices:

1. working on your own
2. working in a team
3. using checking procedures
4. maintaining personal hygiene.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	your retail organisation's product specifications for achieving meat product yield
2	your retail organisation's specifications for finishing meat products
3	the temperatures at which meat products should be kept during handling, transfer and storage, and the reasons for this
4	reasons for rejecting finished meat products
5	procedures to deal with finished meat products that have been rejected
6	how to clean tools and equipment
7	reasons for storing tools and equipment as instructed
8	your retail organisation's safe and hygienic working practices

Performance criteria

You must be able to:

1	identify and reject meat products that don't meet the specification your retail organisation expects, and put them in a suitable place away from other meat products
2	deal with finished meat products that have been rejected in line with your retail organisation's safety requirements
3	achieve the finished meat product specification your retail organisation expects within the time allowed
4	keep finished meat products at the specified temperatures and store them safely, securely and hygienically
5	clean and store tools and equipment in line with your retail organisation's safety and processing requirements
6	follow your retail organisation's safe and hygienic working practices at all times

Unit 54: Maintain food safety while working with food in a retail organisation

Unit code:	PPL.B235
SCQF level:	5
Credit points:	5

Unit summary

This standard is about maintaining food safety in a retail organisation. This standard applies to personnel whose main job role requires working in a food preparation area and involves any of these activities:

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

This standard is for all personnel involved in food preparation in a retail organisation. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- maintain food safety in a food preparation area of a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; maintains; maintaining; meat; fish; poultry; produce; vegetables; cheese; baking; bakery; butchers; butchering; butchery.

Glossary

Accessories – Additional items apart from clothing and jewellery, for example, false nails
Correct person [to report to] – This could be a supervisor or manager

Cross-contamination – In your retail organisation there are two kinds of cross-contamination to guard against:

1. the transfer of harmful bacteria between foods by direct contact (e.g. the juices of raw meat dripping onto cooked meat stored on a lower shelf), or indirect contact (e.g. via the hands, clothing, cloths, equipment or other surfaces)
2. the cross-contamination of foods containing specific allergens (e.g. nuts, milk, eggs) with other food (e.g. by use of common utensils on cold meat counters and salad bars, slicers on deli counters, etc., by the mixing of foods due to damaged packaging or spillages, or via hands, clothing, cloths or other surfaces)

Food handling practices – Depending on the type of food and the activities being carried out, food handling practices may include: keeping finished products separate from other materials keeping raw and cooked meat products separate getting rid of waste, and contaminated or damaged products

Food spoilage – When food goes bad and has a noticeable change in its taste, smell or appearance

Indicators of potential food safety hazards – Things that could make food unsatisfactory for consumers, for example:

1. damaged packaging
2. spillage into another food
3. out of date stock
4. food not stored where it should be (for example, if customers have moved food)
5. chiller cabinets or freezers that are not operating at the right temperature
6. ovens or hot hold cabinets that are not operating at the right temperature
7. use of the same utensils to handle different foods
8. food waste that needs disposing of
9. dirt
10. pests such as rodents or insects

Infestation – The presence of pests such as insects or rodents in the workplace which puts food safety at risk

Procedures – A series of clear steps or instructions on how to do things: rules. Some organisations document their procedures formally in writing, and others simply have procedures that all staff understand and follow, but that are not written down

Protective clothing – Clothing your retail organisation provides for food safety reasons, which could include:

1. trousers
2. tops such as jackets or tabards
3. coats
4. disposable gloves
5. headgear such as caps or hairnets
6. aprons
7. shoe protectors

Right times [to wash hands] – Appropriate times to wash hands would include:

1. after going to the toilet
2. before going into food production areas, including after any work breaks
3. after getting rid of waste
4. after cleaning
5. before and after changing a dressing or touching an open wound

Specified temperatures – Temperatures specified by relevant legislation or in your retail organisation's procedures

Unsafe behaviour – Behaviour that can make food unsafe for customers, including:

1. touching the face, nose or mouth
2. smoking
3. chewing gum
4. eating
5. scratching
6. coughing or sneezing

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how personal hygiene and behaviour affect food safety in the workplace
2	the types of illness the relevant legal regulations require to be reported to an employer
3	why skin infections and wounds must be reported and treated
4	what the relevant procedures are for covering open wounds
5	how food handling practices affect food safety in the workplace
6	why the immediate work area must be kept clean and tidy
7	your retail organisation's schedules and procedures for cleaning the workplace and why these must be followed
8	why certain foods must be kept at specified temperatures and how to do so
9	your retail organisation's schedule and procedures for checking and reporting the condition of food and food storage areas, and why these must be followed
10	your retail organisation's procedures for maintaining food safety in food preparation areas
11	the main types of infestation in food preparation areas, how they can happen, how to prevent them, how to recognise them and what to do if these are discovered
12	the main types of food safety hazards and cross-contamination, how they can happen, how to prevent or reduce the risk of them happening and what to do if indicators of food safety hazards or cross-contamination are discovered

Knowledge and understanding

13	the causes of food spoilage, how to recognise food spoilage and what to do if it is discovered
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Performance criteria

You must be able to:

1	keep yourself clean and protected during work activities in food preparation areas
2	keep your hair, skin and nails in a suitable condition for working with food
3	remove any jewellery and other accessories that could cause food safety hazards
4	maintain and wear clean clothes, including any protective clothing your retail organisation provides
5	maintain and wear the protective clothing correctly and change them following your retail organisation's policies and procedures
6	wash your hands at the right times and using effective washing methods
7	avoid unsafe behaviour that could contaminate the food being prepared
8	report any open wounds, skin infections and infectious illnesses promptly to the correct person
9	make sure any open wounds and skin infections are treated and covered with a suitable dressing
10	keep your work area and food preparation area in the right condition for working with food
11	keep the immediate work area clean and tidy during all work activities
12	carry out any scheduled cleaning at the right times and in line with your retail organisation's procedures
13	keep tools, utensils and equipment in good working order, in a hygienic condition and stored correctly
14	work in a way that keeps food safe for customers
15	follow your retail organisation's procedures to dispose of food waste promptly and hygienically
16	protect food from food safety hazards and cross-contamination during all work activities
17	follow your retail organisation's procedures for dealing with contaminated food

Performance criteria	
18	follow your retail organisation's procedures for items that may cause allergic reactions
19	label products clearly with the correct use-by/expiry dates
20	check and record the condition of food
21	check food and food preparation and storage areas in line with your retail organisation's schedules and procedures
22	maintain food safety at all times when working in food preparation areas
23	follow your retail organisation's procedures for keeping accurate and complete records of the checks that need to be made
24	follow your retail organisation's procedures for any indicators of potential food safety hazards within your authority to deal with
25	follow your retail organisation's procedures for identifying infestations in the food preparation area and report them to the correct person
26	promptly report to the correct person any indicators of potential food safety hazards not within your authority to address

Unit 55: Organise your work to meet a dough production schedule in a retail organisation

Unit code: PPL.B243

SCQF level: 5

Credit points: 4

Unit summary

This standard is about helping to ensure that dough production in a retail organisation runs to schedule and without wasting time, ingredients or other resources. This involves organising your own work to meet the dough production schedules allocated. It is also about making suggestions to improve dough production schedules to become more effective.

This standard is for individuals responsible for working to bakery schedules and targets and includes owners, managers, team leaders and bakery personnel.

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

- organise your work to meet a dough production schedule in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; bakery; baking; bakes; doughs; pastries; biscuits; scones; pastry; buns; organising; organises.

Glossary

Dough:

Common types of fermented dough include those used for:

1. bread
2. plain and fruited buns
3. Danish pastries
4. croissants.

Common types of non-fermented dough include those used for:

1. puff pastry
2. scones
3. biscuits.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to organise your work efficiently within a dough production schedule, including reorganising your work to meet changing dough production needs and your retail organisation's expectations
2	how to organise your work so as to avoid delays that result in dough no longer being in the required condition
3	how to get the instructions needed for your dough production schedule
4	the limits of your authority and responsibility for organising your work within the dough production schedule
5	how to organise your work within the dough production schedule to make best use of your time and other resources
6	where and when to get help and advice about problems with dough production schedules and resources
7	how to meet dough schedules for your retail organisation
8	the requirements for health and safety and food safety and hygiene that apply to your work within the dough production schedule, and why these must be followed
9	how to make suggestions about improvements that can make dough production schedules more effective

Performance criteria

You must be able to:

1	check all the instructions needed for your dough production schedule in your retail organisation
2	organise your work within the dough production schedule making best use of time and resources
3	tell the correct person about any problems with the quantity or quality of resources available to make dough production achievable
4	tell the correct person if your dough production schedule does not seem to be realistically achievable
5	meet the dough production schedule in your retail organisation
6	work within the relevant requirements for health and safety and food safety and hygiene
7	make suggestions to the correct person about how dough production schedules can be more effective

Unit 56: **Select, weigh and measure ingredients in bakery operations**

Unit code: IMPCB101

SCQF level: 5

Credit points: 5

Unit summary

This standard covers the skills and knowledge needed to select, weigh and measure bakery ingredients by hand, in craft, artisan or in-store bakery operations.

You need to show and understand how you identify and select the correct ingredients required by a product specification, recipe or work instructions. You will need to check and know the condition of the ingredients, weigh and measure the required quantities and store these in preparation for mixing or use later in processing. You need to know how to check weighing and measuring equipment, prevent contamination of ingredients and know the common factors affecting the quality of ingredients.

Complying with and understanding health and safety, food safety, allergen and organisational requirements are essential features of this standard.

This standard is for you if you work in bakery operations, and can be applied in the context of fermented dough, non-fermented dough or flour confectionery production.

Unit assessment requirements/evidence requirements

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

Keywords

Select; weigh; measure; ingredients; bakery; baker.

Assessment outcomes and standards

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

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

Knowledge and understanding

11	how to report non-availability of ingredients and source alternative supplies of ingredients or alternative ingredients as permitted
12	the importance of using the correct type of weighing and measuring equipment according to the types and quantities of ingredients used
13	how to label safely and store ingredients ready for mixing or further processing

Performance criteria

Identify ingredients

You must be able to:

1	identify the specified ingredients to meet production needs
2	check quantities according to your instructions and specifications
3	carry out any calculations necessary to establish quantities of ingredients required to meet production needs

Select ingredients

You must be able to:

4	select ingredients to meet production and quality needs in accordance with specifications
5	isolate and report ingredients of substandard quality, condition or quantity to the relevant personnel
6	take action where ingredients are not available to source alternative supplies or establish whether alternative ingredients can be utilised in accordance with procedures
7	store and position ingredients ready for further processing
8	comply with health, safety, food safety, allergen and organisational requirements

Performance criteria

Weigh and measure ingredients

You must be able to:

9	check selected ingredients against your instructions and specifications
10	select and check the accuracy of bakery weighing and measuring equipment in accordance with procedures
11	weigh and measure the required ingredients, avoiding contamination or cross-contamination in accordance with procedures
12	place the weighed and measured ingredients in the correct conditions and label storage containers or mixing bowls, where required, ready for further processing
13	comply with health, safety, food safety, allergen and organisational requirements
14	carry out cleaning, lubrication and detection activities in accordance with procedures
15	operate within the limits of your own authority and capabilities

Unit 57: Divide, mould and shape fermented dough in bakery operations

Unit code:	IMPCB105
SCQF level:	5
Credit points:	6

Unit summary

This standard covers the skills and knowledge needed to divide, mould and shape fermented dough by hand, in craft, artisan or in-store bakery operations. Fermented dough typically includes that for bread, rolls, sticks, enriched, sour and laminated dough and dough for free-from products.

You need to show and understand how you hand divide dough using a knife and scales, and a manually operated dough portioning device. You will need to demonstrate hand moulding skills, and the shaping of dough by hand and using a rolling pin. You need to know how to recognise and prevent contamination during processing. You need to understand the role of yeast and the principles of the fermentation process in dough. You need to know the basic structure of dough and how processing affects gas production and retention rates. You also need to know how the control of fermentation during processing determines product quality. Complying with and understanding health and safety, food safety, allergen and organisational requirements are essential features of this standard.

This standard is for you if you work in bakery operations, and is applied in the context of fermented dough production.

Unit assessment requirements/evidence requirements

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

Keywords

Divide; mould; shape; dough; fermentation; bakery; baker.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the standards of health and safety and food safety you are required to comply with, why it is important that you do so, and what might happen if standards are not met
2	why it is important to follow work instructions and product specifications or recipes throughout dough processing
3	how to recognise and report dough that does not meet specification, and the procedure for rejecting and isolating failed dough and dough portions
4	the importance of accurate dividing and check weighing of fermented dough
5	how to seek advice and make process adjustments to dough to take into account minor changes in ingredient performance, production timing and environmental conditions necessary to keep a dough within specification
6	how to prevent dough contamination and cross-contamination during processing and what might happen if this is not done
7	what the lines and methods of effective communication are and why it is important to use them correctly
8	what the documentation requirements are and why it is important to meet them
9	personal protective clothing/equipment and working practices which are useful in combating the potentially harmful effects of dust and allergies resulting from breathing or skin contact with ingredients or dough
10	the cell structure and properties of yeast as a living organism, the feeding, growth and multiplication of yeast cells

Knowledge and understanding

11	the principles of fermentation in dough; the role and action of enzymes, carbon dioxide gas and alcohol production
12	the factors affecting fermentation rate: temperature, sugar, salt, pH, nitrogen, fats, spices, mould and rope inhibitors
13	what happens if dough fermentation is allowed to progress without processing controls
14	how the rate of dough fermentation is controlled in dough by temperature and humidity-controlled processing environments
15	the structure of dough, its capacity to form gas cells and trap gas bubbles, and changes that occur during moulding, shaping and resting that are critical to successful dough fermentation and development
16	the function of key ingredients in dough making which can influence dough fermentation rates
17	the gas production and retention properties of long-process dough-processing methods, bulk fermentation process (BFP), sponge and dough process
18	the gas production and retention properties of short-process dough-processing methods; mechanical dough development in the Chorleywood Bread Process (CBP), activated dough development (ADD), no-time dough process
19	how to maintain dough condition and deal with fermentation time constraints
20	how to recognise dough fermentation problems which do not comply with specification

Performance criteria

Divide fermented dough

You must be able to:

1	check the available dough against your instructions and specifications and take prompt action on discovering any discrepancy
2	obtain and check the condition of dividing tools and the accuracy of equipment in accordance with procedures
3	hand divide dough in accordance with product specifications
4	minimise waste and deal with scrap material in accordance with procedures
5	position and maintain divided dough portions for further processing
6	comply with health, safety, food safety, allergen and organisational requirements throughout dividing operations

Mould and shape fermented dough

You must be able to:

7	check the available portioned dough against your instructions and specifications and take prompt action on discovering and discrepancy
8	prepare and maintain an appropriate table surface for moulding and shaping
9	hand mould and shape portioned dough in accordance with product specifications
10	wash and dress shaped dough surfaces as required to specification
11	minimise waste and deal with scrap material in accordance with procedures
12	place dough in the correct condition and location for further processing
13	comply with health, safety, food safety, allergen and organisational requirements throughout moulding and shaping operations

Performance criteria

14	carry out cleaning, lubrication and detection activities in accordance with procedures
15	operate within the limits of your own authority and capabilities

Unit 58: Hand-process fish in a retail organisation

Unit code: PPL.B248

SCQF level: 5

Credit points: 6

Unit summary

This standard is about hand-processing fish in a retail organisation for sale to customers. This involves identifying and hand-processing common types of flat and round fish. Safe and hygienic work practices are an important aspect of this standard. This standard is for owners, managers, team leaders and sales personnel on a fish counter or in a retail fishmongers.

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

- hand-process fish in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; processes; processing; hand-processes; hand-processing; preparing; prepares; flat fish.

Glossary

Fish

1. flat fish
2. round fish.

Hand-processing

1. filleting
2. skinning
3. heading
4. scaling
5. gutting
6. boning
7. portioning
8. steaking.

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

1	organise your work area, equipment and tools so that fish can be dealt with safely, hygienically and efficiently
2	maintain hygienic working conditions when checking and hand-processing fish
3	check that the fish is of saleable quality
4	hand-process fish in ways that achieve specifications for yield and quality, minimise waste, and keep fish in a saleable condition throughout processing
5	maintain the health and safety of yourself, colleagues and customers
6	dispose of waste in ways that are safe and hygienic and that meet the relevant legal and your retail organisation's requirements for recycling
7	follow the schedule for cleaning and tidying the work area, tools and equipment
8	put hand-processed products that meet specifications into containers that will keep the products in a saleable condition

Unit 59: Monitor and contribute to improving food safety in a retail organisation

Unit code:	PPL.B308
SCQF level:	6
Credit points:	8

Unit summary

This standard is for personnel who supervise staff that handle or prepare wrapped or unwrapped food, including food subject to temperature control. The standard is firstly about monitoring food safety in line with a retail organisation's food safety procedures. Secondly, the standard is about making a contribution to continuously improving food safety. This standard is for owners, managers and team leaders.

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

- monitor and contribute to improving food safety in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; monitors; monitoring; improves; improving; helps; helping; assists; assisting; meat; fish; produce; bakery; butchery.

Glossary

Control measures – Actions required to prevent or remove a food safety hazard, or reduce it to an acceptable level

Control points – Steps in the food preparation process that can be controlled, but would not result in an unacceptable health risk if control was not exercised

Corrective actions – The actions to be taken when a critical limit is breached

Critical control points – Steps in the food control or preparation process to deal with a food safety hazard by preventing it, removing it or reducing it to an acceptable level

Critical limits – The minimum and maximum limits allowed in order to control a particular task or process

Food safety hazards – Something that may cause harm to the consumer and can be:

1. microbiological (e.g. bacteria, moulds, viruses)
2. chemical (e.g. pesticides used on fruit and vegetables, chemicals used in cleaning or for pest control)
3. physical (e.g. insects, parasites, glass, nails)
4. allergenic (e.g. nuts, milk, eggs)

Food safety management – Putting into practice the policies, procedures, practices, controls and documentation that ensure that food is safe for consumers

Procedures – A series of clear steps or instructions on how to do things: rules. Some organisations document their procedures formally in writing, and others simply have procedures that all staff understand and follow, but that are not written down

Training – Bringing an individual up to a desired level or standard of proficiency. This can be done by means of informal instruction or by formal training courses

Variance – The difference between the planned or standard limits allowed and the actual values monitored

Verification – Using a selection of methods, procedures and tests to show and confirm that the system is operating in line with the plan

Assessment outcomes and standards

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

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

Knowledge and understanding

14	what continuous improvement is and why it is important to contribute to the improvement process
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Performance criteria

You must be able to:

1	identify and monitor critical control points in your retail organisation
2	identify relevant food safety control measures
3	allocate and supervise food safety responsibilities
4	identify and meet staff training needs
5	complete all your retail organisation's specified operational controls and checks at the set time frequency
6	keep accurate and complete records of monitoring
7	obtain verification for completed monitoring checks, following your retail organisation's procedures
8	take suitable corrective action with the appropriate degree of urgency when control measures fail
9	report to the appropriate person any procedures that are out of line with critical limits
10	seek expert advice and support for matters outside your level of authority or expertise
11	highlight and suggest areas for improvement
12	identify and report any factors or issues that arise that may affect the safety of food
13	identify and report any factors or issues within your retail organisation, supplies or products that may affect the safety of food
14	contribute to improving food safety
15	contribute to team meetings with ideas and suggestions to improve procedures or processes
16	contribute to introducing new procedures and/or reviewing existing ones in order to improve food safety
17	interpret and use food safety management procedures

Performance criteria

18	check your understanding and that you can use any new control measures that are introduced related to food safety
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Unit 60: Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products

Unit code: PPL.C268

SCQF level: 6

Credit points: 8

Unit summary

This standard is about helping customers to choose the alcoholic beverages that best match their requirements in a retail organisation. This involves finding out what customers are looking for, advising on products and supporting any recommendations with relevant product information.

Strict laws apply to the sale of alcohol in retail organisations in the United Kingdom and they need to be complied with at all times.

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

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

- help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; helps; helping; assists; assisting; chooses; choosing; picks; picking; selects; selecting; wines; beers; lagers; stouts; ales; ciders; spirits; alcopops; alco-pops; liqueurs; drinks; bottles; cans.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the relevant laws and your retail organisation's policies relating to the sale of alcoholic beverages
2	why the relevant laws and your retail organisation's policies for selling alcohol must be followed and what can happen to you and to your retail organisation if these are not followed
3	when and how to explain to customers the relevant law and your retail organisation's policies for selling alcohol
4	how to establish a rapport with customers
5	the kinds of questions to ask customers in order to find out their requirements and advise them accurately
6	where to find reliable information about the alcoholic content of the alcoholic beverages your retail organisation sells
7	the characteristics of different alcoholic beverages and how to match these to customers' requirements
8	how product information can give customers confidence in your product recommendations and advice
9	how to decide which product features are relevant and how much detail customers require to help them choose products
10	effective ways of comparing and contrasting products for customers
11	why it is important to encourage customers to ask questions about products
12	how to respond to customers' questions in ways that promote sales
13	how to recognise opportunities to recommend associated or additional products

Knowledge and understanding

- | | |
|----|---|
| 14 | why it is important to check the whole area for security and potential sales whilst helping customers |
|----|---|

Performance criteria

You must be able to:

1	follow all relevant laws and your retail organisation's policies relating to the sale of alcoholic beverages
2	explain clearly and politely to customers, when necessary, the relevant laws and your retail organisation's policies relating to the sale of alcoholic beverages
3	use effective questioning techniques to establish a rapport with customers and find out what they are looking for
4	advise and recommend products as closely as possible to customers' stated requirements, from the relevant alcoholic beverages available
5	support your product recommendations with factually correct information that is likely to give customers confidence in your recommendations
6	compare and contrast products in ways that help customers choose the products that best meet their requirements
7	encourage customers to ask questions and respond to their questions, comments and objections in ways that promote alcoholic beverage sales
8	recognise and act on suitable opportunities to recommend to customers associated or additional products
9	check for security risks in the sales area whilst assisting customers
10	check for further retail sales opportunities in the sales area

Unit 61: Promote sales of food or drink products by offering samples to customers and following relevant food safety requirements

Unit code: PPL.C275

SCQF level: 4

Credit points: 3

Unit summary

This standard is about offering customers samples of food or drink products to consume immediately, as a way of promoting sales. Suitable products need to be selected, prepared and displayed so they look appealing. Customers need to be actively encouraged to sample and buy products. Relevant food safety requirements need to be followed when preparing, displaying and disposing of product samples.

This standard is for all sales personnel with food hygiene training.

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

- promote sales of food and drink products by offering samples to customers and following relevant food safety requirements.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; promotes; promoting; advertises; advertising; sells; selling; items; produce; goods; offers; gives; giving; sampling.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how the opportunity to sample food and drink products helps to promote sales
2	your retail organisation's criteria for selecting products for sampling, including product type and sell-by date
3	your retail organisation's procedures and standards for preparing and displaying samples
4	the required temperatures for safely storing and serving samples
5	the information that must be given to customers about potentially allergenic ingredients and your retail organisation's procedures for giving this information
6	how to spot opportunities to encourage customers to sample products
7	how to deal with customers politely who misuse the sampling activity
8	how to use words and body language to encourage customers to sample food and drink products
9	where customers can buy the food and drink products sampled and how to explain this clearly to customers
10	why it is important to monitor the freshness of samples on display, and how to do so
11	relevant legal requirements and your retail organisation's procedures for disposing of waste products and recording food disposals

Performance criteria

You must be able to:

1	identify suitable opportunities to promote sales by offering samples of food and drink products to customers
2	select suitable products for sampling
3	prepare product samples in line with your retail organisation's procedures and relevant legal food safety standards for preparation and presentation
4	follow your retail organisation's procedures for giving customers information about potentially allergenic ingredients
5	spot suitable opportunities to encourage individual customers to sample products
6	use persuasive words and body language to encourage customers to sample the products
7	deal politely with customers who misuse the sampling activity
8	explain clearly to customers, when necessary, where they can buy the food and drink products sampled
9	monitor the freshness of samples on display and remove samples that no longer meet requirements for freshness
10	dispose of waste products in line with your retail organisation's and legal food safety requirements
11	follow your retail organisation's procedures and legal requirements for recording food disposals

Unit 62: Help customers to choose delicatessen products in a specialist retail organisation

Unit code:	PPL.C278
SCQF level:	5
Credit points:	7

Unit summary

This standard is about helping customers to choose delicatessen products in your specialist retail organisation. It also covers providing information about delicatessen products to help customers make choices and suggesting alternatives where appropriate.

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

This standard is for owners, managers, department managers, team leaders and sales/customer service assistants with suitable food safety training.

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

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

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; helps; helping; assists; assisting; chooses; choosing; choices; picks; picking; selects; selecting; delicatessens; produce; goods; items; cheeses; cold meats; meats; salads.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to establish a rapport with customers
2	the kinds of questions you need to ask customers in order to find out their requirements
3	where to find reliable information about the delicatessen products on sale that will help customers choose appropriately
4	effective ways of comparing and contrasting products for customers
5	how to recognise opportunities to recommend associated or additional products
6	practical limits on portion weight, size or shape
7	how to explain tactfully to customers when portion requirements cannot be met, and what alternatives can be offered

Performance criteria

You must be able to:

1	use questioning techniques effectively to establish a rapport with customers and find out what they are looking for
2	match products as closely as possible to customers' stated requirements, from the delicatessen products available
3	support product recommendations with factually correct information that is likely to help customers choose delicatessen products
4	compare and contrast products in ways that help customers choose the products that best meet their requirements
5	recognise and act on suitable opportunities to recommend to customers associated or additional products
6	suggest alternative portion sizes or products in a tactful way when customers' requests are impractical

Unit 63: Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation

Unit code: PPL.C279

SCQF level: 5

Credit points: 6

Unit summary

This standard is about helping customers to choose delicatessen products in your specialist retail organisation or on a specialist counter within a more general retail organisation, portioning products to meet individual customers' requirements.

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

Customers specify the portion size or weight and expect the resulting portions to be very close to the specified size or weight and to be in a presentable condition.

This standard is for owners, managers, department managers, team leaders and sales/customer service assistants who have received suitable food safety training.

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

- portion delicatessen products to meet individual customers' requirements in a specialist retail organisation or on a specialist counter within a general retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; portions; portioning; cuts; cutting; slices; slicing; delicatessens; produce; goods; items; cheeses; cold meats; meats; salads; individuals; needs.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the relevant food safety and general health and safety requirements to be complied with when handling, portioning and disposing of products
2	why it is important to meet individual customers requirements
3	which tools and utensils to use with which products and why
4	how to cut products safely and in ways that achieve the required portions whilst minimising waste
5	the conventionally accepted portion shapes for the products requiring portioning
6	how to use weighing scales, including how to allow for the weight of additional items such as containers
7	how to choose packaging to suit the product type and portion size
8	accepted standards of presentation for products from which portions have been taken
9	when and how to adjust or dispose of remaining products

Performance criteria

You must be able to:

1	handle and portion delicatessen products in ways that comply with all relevant food safety legislation and meet individual customers' requirements
2	use tools and utensils suited to the products
3	cut products so as to produce conventionally acceptable portion shapes, maintain the attractiveness of the product, minimise waste and comply with all relevant health and safety requirements
4	take into account the weight of any additional items on the scales such as containers when weighing portions
5	check that customers are satisfied with the portioned products before they are wrapped
6	place portioned products in suitable packaging
7	check that the products from which portions have been taken are still in saleable condition, and adjust, remove or replace them as required
8	dispose of any unsaleable products in line with all relevant health and safety requirements, including food safety requirements

Unit 64: Establish retail customers' requirements and provide advice regarding tiling products

Unit code:	PPL.C262
SCQF level:	5
Credit points:	6

Unit summary

This standard is about establishing retail customers' requirements and providing the correct advice on tiling products that are best suited for the intended application. This standard is for owners, managers, department managers, team leaders and sales/customer service assistants.

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

- establish retail customers' requirements and provide advice regarding tiling products.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; establishes; establishing; identifies; identifying; works out; working out; determines; determining; requirements; provides; providing; gives; giving; advises; advising; tiles; grouts; sealants; ceramics; customers.

Glossary

Sustainability – Any environmental considerations that apply, such as:

1. the impact of the manufacturing process upon the environment
2. the scarcity of the natural materials used in the manufacturing process
3. any effects the finished product may have on the environment

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the different locations where tiles are used, the factors to consider when determining which tiles are suitable and why this is important when advising retail customers
2	the relative advantages and disadvantages of a tiled area compared with the principal other types of surfaces
3	how to use questioning to establish retail customers' requirements regarding tiling products
4	the constituent materials and general manufacturing process of the tiling products that your retail organisation is involved in selling
5	the delivery times for the tiles that your retail organisation is involved in selling
6	the implications of building regulations and sustainability for the tiles that your retail organisation offers
7	the principal types of adhesives and grouts and what these are used for
8	the principal types of integral fittings and accessories available and which can be installed during or after tiling
9	procedures for cutting and drilling through tiles
10	the reasons for possible differences in sizes and shading of tiles, and the purpose of batch numbers
11	current trends in tiling design and fashion
12	the types of tile fixing, trim and beading and those most appropriate for different applications
13	the circumstances when it is important to use silicone sealants

Knowledge and understanding

14	where to seek information appropriate to retail customers' requirements, particularly non-standard requirements
15	how to follow your retail organisation's customer service standards when advising retail customers on tiling products
16	how to listen actively
17	the principal forms of underfloor heating, and those floor finishes that are suitable

Performance criteria

You must be able to:

1	establish correctly where retail customers intend to use the tiling products and why they are being considered
2	determine retail customers' budget and delivery timescale for the tiling products
3	establish the nature of the surface to be tiled, and determine correctly any consequent considerations regarding the suitability of particular tiling products and how they might be fixed
4	identify whether retail customers require any fixtures or fittings once their requirements have been established and advise them accordingly
5	establish how the tiled surfaces are to be used and advise retail customers correctly upon the available types of tile suited to the intended use
6	explore and determine retail customers' preferred colours, styles, design and layout of tiles
7	provide retail customers with samples of appropriate tiles and displays according to their requirements
8	advise why certain styles may be better suited to particular types of homes
9	advise retail customers correctly regarding the relevant tiling finishes available, including appropriate trims and beadings
10	determine correctly whether retail customers are seeking other requirements such as underfloor heating

Performance criteria

11	follow your retail organisation's customer service standards whilst establishing retail customers' requirements and advising them regarding tiling products
12	listen actively and promote understanding by using words that are clear, concise and suited to retail customers' requirements

Unit 65: Advise customers upon measuring and planning for the fixing of tiles

Unit code: PPL.C263

SCQF level: 6

Credit points: 8

Unit summary

This standard is about establishing customers' circumstances and advising those seeking to measure and plan for the fixing of tiles on how best to achieve this. This standard is for owners, managers, department managers, team leaders and sales/customer service assistants.

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

- advise customers on measuring and planning for the fixing of tiles.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; advice; advises; advising; measures; plans; fixes; provides; providing; gives; giving; tiling.

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

1	determine correctly the nature of the location being tiled, and the subsequent use to which the tiled surfaces are to be put when advising customers on measuring and planning for the fixing of tiles
2	identify correctly the nature of the materials suited for the intended location
3	check and confirm, where possible, the accuracy of measurements provided by customers
4	calculate correctly the area of the surface to be tiled
5	calculate correctly the number of tiles required, taking into account the intended design and any use of motif and border tiles
6	determine correctly the amount of trim, edging material and sealants required
7	calculate correctly the amount and type of adhesive needed
8	identify correctly the number and size of spacers required
9	determine correctly the type, colour and amount of grout required
10	calculate correctly how any other requirements, such as underfloor heating, will affect the measuring and planning process
11	provide accurate estimates for customers, explaining clearly and correctly the component parts
12	listen actively and encourage questions from customers towards promoting customers' understanding

Unit 66: Advise customers upon the fixing of their own tiles

Unit code: PPL.C264

SCQF level: 6

Credit points: 8

Unit summary

This standard is about establishing customers' circumstances and advising them on the fixing of their own tiles upon surface preparation. This standard is for owners, managers, department managers, team leaders and sales/customer service assistants.

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

- advise customers on the fixing of their own tiles.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; advice; advises; advising; fixes; provides; providing; gives; giving; tiling.

Assessment outcomes and standards

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

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

Knowledge and understanding

12	methods and materials for fitting, fixing and sealing underfloor heating systems
13	how to finish tiled surfaces off upon completion of tiling
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
15	the various cleaning and maintenance products available, the application of these and how to use them safely
16	why it is important to advise customers correctly upon fixing tiles

Performance criteria

You must be able to:

1	determine required details about the surfaces upon which customers' tiles are to be fixed, establishing the nature of the surface being tiled
2	advise customers correctly regarding any required preparation of the surface
3	establish how the finished tiled surfaces are to be used
4	identify and select appropriate adhesives and grout to meet customers' requirements
5	inform customers about the products that will be used, including the order of application and how products are to be applied
6	identify whether there are any existing or planned fixtures, fittings, pipework and cabling, and establish correctly their potential impact for the fixing of the proposed tiles
7	determine whether there is, or will be, underfloor heating and determine correctly the impact for the fixing of the proposed tiles

Performance criteria	
8	agree with customers how best to accommodate any existing or planned fixtures, fittings, pipework or cabling
9	brief customers on safe working and best practice techniques
10	explore with customers and gain agreement on how the tiled surfaces are to be finished off
11	explain correctly how to take care of the tiled surfaces
12	offer the appropriate cleaning and maintenance products to customers, where relevant
13	provide confidence to customers that the decisions taken throughout the process will meet their expectations and tiling requirements

Unit 67: Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt

Unit code: PPL.B238

SCQF level: 5

Credit points: 7

Unit summary

This standard is about preparing to receive deliveries of fuel on a forecourt for driver-controlled transfers to fuel tanks. Fuel poses serious risks to health and safety and it is vitally important that all the necessary precautions are maintained, and that relevant regulations are followed in all geographical locations of the United Kingdom (UK).

This standard is for all personnel who are responsible for preparing for deliveries of driver-controlled transfers, including owners, managers, team leaders, and authorised staff.

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

- prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; delivery; delivering; receives; receiving; accepts; accepting; takes; taking; petrol; diesel; forecourts; petrol stations; stations.

Glossary

Driver-controlled transfer – when fuel is transferred to the storage tanks on the forecourt by the driver

Fuel – all types of motor fuel stored in your retail organisation's forecourt

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the relevant documentation you need to prepare to receive deliveries of fuel for driver-controlled transfers to fuel tanks and how to interpret it
2	how to work out the amount of space available in the fuel storage tanks on the forecourt for driver-controlled transfers
3	what equipment and materials to prepare for safe and effective delivery, what they are used for and where to find them
4	typical hazards and problems that occur in relation to deliveries, and how to deal with problems within your area of responsibility
5	the relevant legal and your retail organisation's requirements relating to fuel on forecourts
6	which problems are not within your area of responsibility and who to refer them to
7	how fuel can be dangerous
8	where all relevant health and safety equipment is and how to access it
9	how to set up a hazard zone around the delivery area and cone off relevant areas of the forecourt
10	what information drivers require prior to transferring fuel
11	what the relevant legal regulations are relating to the UK geographical location of your retail organisation

Performance criteria

You must be able to:

1	find out the expected delivery time and the type and amount of fuel to be received and check these against the relevant documentation relating to the order of fuel
2	check that there is sufficient space in the relevant fuel storage tanks for the expected fuel so that driver-controlled transfers can be carried out
3	check and prepare the equipment and materials needed to ensure safe and effective fuel delivery
4	check equipment and materials are in working order
5	identify potential hazards and problems and follow the relevant legal and your retail organisation's requirements for removing them or making them safe
6	record and report potential hazards in line with the relevant legal and your retail organisation's requirements for fuel forecourts
7	give the driver adequate information about the space in the fuel storage tanks
8	tell the driver where to find the relevant health and safety equipment
9	follow the relevant legal and your retail organisation's requirements for preparing a hazard zone around the fuel delivery area and coning off the relevant areas on the forecourt
10	refer problems not within your area of responsibility promptly to the correct person
11	check with the driver that all relevant documentation, equipment and space is available prior to the transfer of fuel
12	follow relevant legal regulations relating to the UK geographical location of your retail organisation

Unit 68:

Check that driver-controlled fuel transfers have been completed

Unit code: PPL.B239

SCQF level: 5

Credit points: 7

Unit summary

This standard is about making the necessary checks after a driver-controlled transfer of fuel is complete. Fuel poses serious risks to health and safety and it is vitally important that these checks are completed and that relevant regulations are followed in all geographical locations of the United Kingdom (UK).

This standard is for all forecourt personnel with authority to check driver-controlled transfers of fuel.

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

- check that driver-controlled deliveries of fuel have been completed.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; delivery; delivering; delivered; checks; checking; petrol; diesel; forecourts; petrol stations; stations.

Glossary

Driver-controlled transfer – when fuel is transferred to the storage tanks on the forecourt by the driver

Fuel – all types of motor fuel stored in your retail organisation's forecourt

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the relevant legal requirements relating to fuel safety in your retail organisation's UK geographical location
2	your retail organisation's requirements for monitoring the driver during fuel transfer activities
3	the safety checks the driver is responsible for making when fuel delivery is complete, and why these checks are needed
4	your retail organisation's procedures for confirming with the driver that the necessary safety checks have been made
5	your retail organisation's procedures when driver-controlled fuel transfers have not been completed safely
6	your retail organisation's procedures for confirming with the driver that the expected type and amount of fuel has been delivered to each tank and all transfers have been completed
7	typical safety hazards associated with driver-controlled transfers and how to identify these, remove them or make them safe, and record or report them
8	how to report unsafe practices to the correct person
9	the documentation you need to complete, and how to complete it

Performance criteria

You must be able to:

1	follow the relevant legal requirements relating to fuel safety in your UK geographical location
2	follow your retail organisation's procedures for monitoring the driver during driver-controlled fuel transfer activities
3	follow your retail organisation's procedures for checking with the driver that the necessary safety checks have been made
4	follow your retail organisation's procedures when driver-controlled fuel transfers have not been completed safely
5	follow your retail organisation's procedures for confirming with the driver that the expected type and amount of fuel has been delivered to each tank and all transfers have been completed
6	identify any safety hazards remaining after delivery, remove them or make them safe and record or report them
7	follow your retail organisation's procedures for reporting unsafe practices to the correct person
8	follow your retail organisation's procedures for completing the relevant documentation after the driver has completed all the transfers
9	follow relevant legal requirements relating to fuel safety

Unit 69: Receive deliveries and transfer fuel on a forecourt

Unit code: PPL.B240

SCQF level: 6

Credit points: 8

Unit summary

This standard is about receiving deliveries of fuel and transferring fuel to tanks. This is where authorised forecourt personnel other than the driver transfers the fuel to the tanks. Fuel poses serious risks to health and safety and it is vitally important that all the necessary precautions are taken, and that you follow relevant legal regulations relating to the UK geographical location of your retail organisation.

This standard is for all personnel involved in the control and transfer of fuel on a forecourt, including owners, managers, team leaders and authorised staff.

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

- receive deliveries and transfer fuel on a forecourt.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; delivery; delivering; delivered; petrol; diesel; forecourts; petrol stations; stations.

Glossary

Driver-controlled transfer – when fuel is transferred to the storage tanks on the forecourt by the driver

Fuel – all types of motor fuel stored in your retail organisation's forecourt

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the delivery details you need to check before fuel is received
2	the delivery details you need to check before fuel is transferred to the tanks
3	how to check that the details in the delivery documents match the order, including details of the type and quantity of fuel
4	typical safety hazards associated with fuel deliveries and the relevant legal and your retail organisation's requirements for dealing with them
5	typical problems with fuel deliveries on the forecourt and how to solve them
6	your retail organisation's procedures for transferring fuel to tanks
7	the conditions that indicate when a transfer must be stopped
8	what to do in the event of an emergency, such as a fuel spill
9	the paperwork you need to complete and how to complete it
10	how to make the site ready for normal use after deliveries and transfers
11	the personal hygiene requirements associated with fuel deliveries and transfers
12	relevant legal regulations relating to the UK geographical location of your retail organisation

Performance criteria

You must be able to:

1	before receiving deliveries of fuel, check that the details in the delivery documents match the order, including details of the type and quantity of fuel ordered
2	follow relevant legal regulations relating to the UK geographical location of your retail organisation
3	identify any problems with the fuel delivery, take suitable action within the limits of your authority, and refer to the correct person any problems you cannot handle
4	check the areas of transfer on the forecourt for risks and hazards
5	transfer fuel only when all risks and hazards are removed
6	transfer the fuel on the forecourt in line with your retail organisation's procedures following all relevant health and safety precautions
7	throughout the delivery, remain alert for potential safety hazards and emergencies and deal with these promptly and in line with the relevant legal and your retail organisation's requirements
8	stop the transfer if any risks or hazards are encountered, in line with your retail organisation's procedures
9	follow all relevant safety and emergency procedures if a fuel spill occurs
10	complete all the necessary paperwork in line with your retail organisation's requirements
11	make the site ready for normal use when the deliveries and transfers are complete
12	follow personal hygiene requirements after deliveries and transfers

Unit 70: Authorise and monitor the self-service dispensing of motor fuel on a forecourt

Unit code: PPL.C266

SCQF level: 5

Credit points: 5

Unit summary

This standard is about your responsibility for authorising and monitoring customers dispensing fuel safely and legally through a self-service system into modes of transport or fuel containers on a forecourt. It can involve transferring the transaction to point of sale when automated systems are not in place. Motor fuel poses serious risks to health and safety and it is vitally important that you authorise the dispensing of fuel only when it is safe to do so.

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

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

- authorise and monitor the self-service dispensing of motor fuel on a forecourt into modes of transport.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; authorises; authorising; allows; allowing; permits; permitting; monitors; monitoring; checks; checking; watches; watching; dispenses; dispensing; petrol; diesel; petrol stations; forecourts; stations.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the importance of only authorising customers allowed to dispense motor fuel in line with safety requirements and relevant law
2	the safety requirements laid down by the relevant law and by your retail organisation for the safe self-service dispensing of motor fuel by customers
3	the layout of the forecourt, including the positions of the self-service pumps
4	the age over which customers may legally dispense motor fuel, and relevant legal and your retail organisation's requirements for checking that customers are over the legal age
5	relevant legal requirements concerning customers filling containers with motor fuel
6	the importance of monitoring and remaining alert for safety hazards while customers are dispensing motor fuel, what hazards can arise, and how to deal with them
7	reasons why dispensing equipment might not work properly, and what action to take when this happens
8	the types of security risk that can arise when customers are dispensing motor fuel and how to remain alert for these
9	how to tell when a drive-off has occurred, and your retail organisation's procedures for recording and reporting drive-offs

Performance criteria

You must be able to:

1	authorise customers to dispense motor fuel from self-service pumps in line with the relevant safety requirements laid down by the law and by your retail organisation
2	follow relevant legal and your retail organisation's requirements for checking that customers are legally old enough to dispense motor fuel into modes of transport and that any motor fuel containers customers use comply with relevant legal requirements
3	activate the self-service pumps promptly when it is safe and legal to do so, and in line with the manufacturer's instructions
4	monitor customers and remain alert for safety hazards while motor fuel is being dispensed
5	take prompt and suitable action to deal with any hazards that arise
6	notice when dispensing equipment is not working properly and take prompt and suitable action
7	when necessary support the transfer of transaction information to the point of sale promptly when customers have finished dispensing motor fuel, in line with manufacturer's instructions
8	remain alert for security risks while customers are dispensing motor fuel
9	notice when customers have driven away without paying, and follow your retail organisation's procedures for recording and reporting drive-offs

Unit 71:

Sort and prepare donated goods in a retail-charity organisation for selling or recycling

Unit code:	PPL.B105
SCQF level:	4
Credit points:	4

Unit summary

This standard is about sorting donated goods and preparing them for either selling or recycling as appropriate.

This standard is for owners, managers, team leaders, sales staff and volunteers, predominantly in retail-charity organisations, but not exclusively if your retail organisation is sorting donated goods in preparation for sale or recycling.

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

- sort and prepare donated goods in a retail-charity organisation for selling or recycling.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; charity; donations; second-hand; sorts; sorting; cleans; cleaning; repairs; repairing; mends; mending.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the types of goods your retail-charity organisation sells
2	the types of goods that can be sent for recycling
3	which types of goods are not suitable for selling or recycling and how to dispose of them
4	the relevant legal and your retail charity organisation's safety requirements that apply to second-hand goods, including electrical equipment, furniture and toys
5	the relevant legal age restrictions that apply to videos, books, DVDs and computer games
6	where to store donated goods until ready to sort them
7	where and when to sort donated goods
8	why areas should be clean and tidy before starting to sort goods
9	where to put goods as they are being sorted
10	who to ask for help in identifying goods you are unsure about or deciding what to do with them
11	the procedures to follow to prepare goods for recycling
12	where to put goods for recycling so that they can be collected
13	how to identify goods that need to be cleaned, tidied or repaired and prepared for sale

Knowledge and understanding

14	how to clean, tidy and repair different types of goods
15	how to use irons and steamers safely and effectively

Performance criteria

You must be able to:

1	clean and tidy the work area before sorting in your retail-charity organisation
2	sort donated goods by their type and condition
3	follow relevant legal procedures for disposing of goods and parts that are not suitable for either selling or recycling
4	ask the correct person for help if you are unsure about the classification of goods
5	put goods suitable for recycling in appropriate containers
6	place containers in the correct place ready for collection and check that they are not in anyone's way
7	identify goods that need to be prepared for cleaning, tidying or repairing
8	follow relevant legal and your retail-charity organisation's requirements for protecting health and safety while preparing, cleaning and repairing donated goods
9	follow relevant legal and your retail-charity organisation's procedures when using irons, steamers and other equipment

Unit 72: Prepare and assemble products for selling to retail customers

Unit code: PPL.B212

SCQF level: 5

Credit points: 4

Unit summary

This standard is about preparing and assembling products so that they are attractive to retail customers and ready to be used in displays, demonstrations or sales activities. It also involves regularly checking the condition of assembled products on display. 'Products' includes stock that needs assembly and/or requires support equipment to display or demonstrate it.

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

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

- prepare and assemble products for selling to retail customers.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; preparing; prepares; items; goods; materials; produce; sale.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	which products within your authority need to be prepared for assembling
2	how to unpack product parts required for assembly
3	your retail organisation's procedures for waste and unwanted packaging for recycling
4	which tools to prepare and use when you assemble products
5	where to assemble products and display equipment
6	where to place assembled products
7	how to work safely when assembling products for sale
8	how to check that products have been correctly assembled and are safe to display
9	who to approach for help when products are proving difficult to assemble
10	why the condition of products on display should be checked regularly
11	your retail organisation's quality standards for assembled products on display
12	how to check the condition of assembled products on display and how often to carry out checks
13	your retail organisation's procedures for dealing with assembled products that are damaged or unsafe

Performance criteria

You must be able to:

1	remove all unwanted packaging of the unassembled products when they arrive in store
2	check that all expected items and parts of the product are in the package
3	follow your retail organisation's procedures for waste and unwanted packaging for recycling
4	gather and prepare all the tools and equipment required for assembling products
5	assemble products in the correct location
6	use safe work methods and follow manufacturers' instructions when assembling products
7	check that products have been assembled correctly and can be used safely
8	ask for help when products are proving difficult to assemble
9	place assembled products in the correct location for the display, demonstration or sales activity
10	check regularly that assembled products on display are in a satisfactory condition
11	remove damaged assembled products promptly from display and follow your retail organisation's procedures for dealing with them

Unit 73: Assist in loading customer orders for despatch in a retail organisation

Unit code:	PPL.B246
SCQF level:	5
Credit points:	2

Unit summary

This standard is about assisting – from time to time – to ensure that customer orders are loaded safely, securely, and in an order that assists the delivery process to run smoothly and efficiently in your retail organisation.

This standard is for managers, team leaders, stores and sales personnel who assist in loading customer orders onto vehicles from time to time.

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

- assist in loading customer orders for despatch in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; loads; loading; online shopping; online; internet; despatches; despatching; dispatches; dispatching.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	why it is important to check the loading area regularly for obstacles, litter and spillages and how to do so
2	why it is important to clear away obstacles, litter and spillages promptly and how to do so safely
3	the information that must be shown on order labels
4	where customers' orders need to be placed for loading
5	why it is important to check the condition of loading equipment regularly
6	who to report faulty equipment to and why
7	how to assist other staff with lifting and moving packed orders without damaging them or injuring yourself or other people
8	how to use safe lifting techniques when lifting customers' orders on your own
9	how the positioning of orders in the vehicle can help the delivery process to run smoothly and efficiently
10	your retail organisation's procedures for positioning orders so that these remain secure and undamaged during transit

Performance criteria

You must be able to:

1	check the loading area for obstacles, litter and spillages and clear these away safely and promptly
2	check that customers' orders are clearly labelled with all the necessary information and placed in the right areas ready for loading
3	check that loading equipment is fit for use by yourself or other staff
4	report any equipment that is faulty
5	assist other staff, when required, with lifting and moving packed orders in ways that prevent damage and injury
6	use safe lifting techniques when lifting customers' orders on your own
7	follow instructions for positioning orders in the vehicle to ensure efficient delivery
8	follow your retail organisation's procedures for positioning orders so that they remain secure and protected from damage during transit

Unit 74: Assemble retail products at customers' premises and assist with installation and initial use

Unit code:	PPL.C220
SCQF level:	6
Credit points:	5

Unit summary

This standard is about assembling retail products and testing them in the customer's home or other place of delivery. It involves helping the customer understand how to install and use the product initially. This is not a selling role, but opportunities should be taken to promote other products when they arise. This standard is for members of staff that are required to visit customers' premises to assemble products.

This may be the main role of the job or only part of it.

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

- assemble retail products at customers' premises and assist with installation and initial use.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; assembles; assembling; puts; putting; constructs; constructing; builds; building; items; materials; goods; customers; homes; workplaces; delivers; delivery; delivering; transports; transporting.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to assemble and install your retail products at customers' premises
2	how to protect the health, safety and security of yourself and others while assembling retail products
3	the sources of information and advice that customers can consult about the retail products, their installation and how to use them
4	the associated or additional retail products that can be promoted to customers
5	how to judge when it is appropriate to promote associated or additional retail products to customers
6	how to behave appropriately in customers' premises and represent your retail organisation positively
7	how to explain the features of retail products in ways that customers can understand

Performance criteria

You must be able to:

1	identify the exact place where customers want the retail product to be assembled and installed, from information they provide
2	agree a suitable place for assembling the retail products if customers' chosen place is not suitable
3	check accurately that all the basic features of the retail product are working properly
4	explain and demonstrate to customers clearly and accurately how to use the retail products and their basic features
5	provide clear explanations if customers require more help in understanding how to use the retail products
6	tell customers about any sources of information they can consult concerning the retail products
7	promote additional or associated retail products to customers where appropriate
8	behave appropriately in customers' premises and represent your retail organisation positively
9	protect the health, safety and security of yourself and others at all times

Unit 75: Demonstrate beauty products to retail customers

Unit code: PPL.C253

SCQF level: 6

Credit points: 6

Unit summary

This standard is about demonstrating the features and benefits of beauty products to retail customers.

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

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

- demonstrate beauty products to retail customers.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; demonstrates; demonstrating; cosmetics; skincare; skin care; make-up; make up; items; goods; materials; toiletries.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the purpose and value of demonstrations in promoting and selling beauty products
2	the tools, materials and products required for demonstrating beauty products effectively and hygienically
3	how your personal hygiene and grooming contribute to making the demonstration comfortable for the retail customer
4	why the retail customer's permission must be gained for the demonstration
5	how to protect the retail customer's hair and clothing from contact with the beauty products being demonstrated
6	the opinions and concerns that retail customers typically have about demonstrations of beauty products and how to tackle these
7	the difference between features and benefits of beauty products
8	the features and benefits of the beauty products your retail organisation is responsible for demonstrating
9	techniques for applying products effectively and hygienically
10	how to organise demonstrations into logical steps and stages, and the importance of doing so
11	how to communicate clear and accurate information before and during demonstrations
12	why equipment and products should be cleared away promptly at the end of the demonstration to reduce retail customers' waiting time

Performance criteria

You must be able to:

1	collect all the tools, materials and products required for an effective and hygienic demonstration of beauty products to retail customers
2	obtain retail customers' permission to carry out the demonstration
3	explain to retail customers clearly and in sufficient detail which beauty products are going to be applied and why
4	check with retail customers whether they are allergic to any beauty products or ingredients, and take care not to apply any of these
5	follow your retail organisation's grooming guidelines and maintain your personal hygiene whilst demonstrating beauty products
6	protect retail customers' hair and clothing from coming into contact with the beauty products being demonstrated
7	apply beauty products in a logical sequence, using effective and hygienic techniques
8	explain clearly the features and benefits that are required to gain retail customers' interest in making a purchase of the beauty products being demonstrated
9	complete demonstrations taking into consideration retail customers' time pressures
10	check whether retail customers want any adjustments made to the beauty products that have been applied
11	clear away promptly the equipment and beauty products at the end of the demonstration to reduce retail customers' waiting time
12	give retail customers the opportunity to look in a mirror at the end of the demonstration ensuring the light and angle of the mirror promote the beauty products that have been applied

Unit 76: Maintain the retail customer record-card system in a retail organisation

Unit code:	PPL.C254
SCQF level:	5
Credit points:	2

Unit summary

This standard is about maintaining accurate and up-to-date record cards of retail customers to help to provide a more effective service to them. It is also about making sure that your retail organisation database is active and relevant for the purposes of promotional activities. This is a service your retail organisation may use instead of a customer database using technology.

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

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

- maintain the retail customer record-card system in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; maintaining; maintains; customers; records; record card; cards; systems.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how using a retail customer record-card system can help achieve sales targets
2	your retail organisation's rules and procedures relating to the retail customer record-card system
3	the benefits to retail customers of the record-card system
4	the importance of updating and maintaining the record-card system regularly and how to do this effectively and efficiently
5	how to find time in the working day to update the retail customer record-card system
6	the relevant aspects of current data protection laws and the importance of keeping to these laws
7	how to identify opportunities to make follow-up appointments
8	the importance of asking retail customers about any special considerations
9	where to find information about products or services and how to interpret this information

Performance criteria

You must be able to:

1	identify suitable opportunities to ask retail customers whether a record card may be set up for them
2	explain clearly to retail customers the benefits to the record-card system
3	record information clearly and accurately
4	keep information about retail customers confidential
5	follow your retail organisation's rules and procedures for setting up, maintaining and updating retail customers' record cards
6	maintain and update the record-card system regularly to ensure effectiveness and efficiency
7	ask retail customers whether they have any special requirements and record this information accurately
8	identify which products and details of retail customers require special consideration when completing the record-card system
9	identify the top retail customers from the record-card system and use this information to help increase sales
10	offer retail customers opportunities to make appointments for return visits to your retail organisation while setting up new record cards

Unit 77:

Maintain a display of cut flowers in a retail organisation that does not specialise in floristry

Unit code: PPL.C267

SCQF level: 5

Credit points: 3

Unit summary

This standard is about maintaining displays of cut flowers in your retail organisation when it does not specialise in floristry, for example supermarkets or petrol forecourt shops.

Cut flowers in non-specialist retailers are usually bought on impulse, so it is essential that the display always looks fresh and attractive. It involves being able to spot and get rid of flowers that make the display unattractive. It also requires being able to answer basic customer queries about the flowers on display.

This standard is for members of staff who have responsibility for the displays of cut flowers in an organisation.

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

- maintain a display of cut flowers in a retail organisation that does not specialise in floristry.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; maintains; maintaining; displays; plants.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the names of the cut flowers on sale, and how to identify these flowers
2	the main reasons why customers buy cut flowers from retail organisations that do not specialise in floristry, what they expect in terms of freshness and long life, and how the quality of the display affects sales
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
4	why flowers that are not fresh enough need to be removed, including how they affect the condition of nearby flowers
5	when and how to check, tidy, and replenish the cut flower display and add water to the flowers as required
6	how to handle cut flowers without damaging them
7	how to balance the requirement to tidy and replenish the display with the requirement to allow customers to view and choose flowers when maintaining the display
8	how to safely and effectively clean up water spillages on or near the flower display
9	how to dispose of unsaleable flowers safely
10	how to respond to customer queries about cut flowers in ways that are polite and encourage sales
11	the likely life of cut flowers once customers have bought them, and how customers can prolong the life of the cut flowers they buy

Performance criteria

You must be able to:

1	check, tidy and replenish the cut flower display at suitable times
2	handle flowers in ways that keep them in a saleable condition
3	add water to the flowers on display at suitable times
4	balance the requirement to maintain the display with the requirement to allow customers to view and choose flowers
5	identify flowers that don't meet your retail organisation's standards for freshness, and remove them promptly
6	clean up water spillages safely and effectively on and around the cut-flower display
7	respond to customers' queries about the flowers on display politely and in ways that are likely to encourage customers to buy flowers on sale
8	identify the flowers on display when customers ask, and help them find the flowers they want if these are available
9	advise on the likely life of the flowers and how to prolong the life of the flowers when customers enquire

Unit 78: Deliver products to customers' premises making the best use of time and resources

Unit code:	PPL.C276
SCQF level:	5
Credit points:	6

Unit summary

This standard is about delivering products to the customer's premises or other place of delivery. It includes planning delivery schedules that make the best use of time and other resources. Giving good customer service during the delivery will encourage repeat business.

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

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

- deliver products to customers' premises making the best use of time and resources.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; delivers; delivering; delivery; items; goods; materials; produce; homes; houses; workplaces; internet; online; catalogues; telephones.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to check that all the products you are due to deliver are present
2	the equipment and paperwork required to make deliveries and where to obtain these
3	what delivery details are required and where to obtain these
4	what sources of information to use for route planning and how to use these
5	how an efficient delivery schedule benefits your retail organisation and the environment
6	how to plan a delivery schedule that makes the best use of time and other resources
7	how to check the vehicle and insurance arrangements are current and correct
8	how to check that there is enough fuel for the delivery schedule and your retail organisation's procedures for getting more fuel if required
9	how to transport products and equipment safely and securely
10	why it is important to deliver products at the times agreed with customers
11	your retail organisation's procedures to follow if the expected arrival time at customers' premises is early or late
12	relevant legal restrictions on who can receive deliveries
13	your retail organisation's procedures to follow when no one is available who can receive the delivery and when customers reject a delivery

Knowledge and understanding

14	how to unload products safely and in ways that protect them from damage
15	why it is important to treat customers courteously, and how to do this
16	the records to keep of deliveries and non-deliveries and your retail organisation's procedures for completing these records

Performance criteria

You must be able to:

1	check that all the products due for delivery are available and ready
2	check that all equipment and paperwork required for the delivery is ready
3	check that all the delivery details and the correct delivery addresses are present
4	plan a schedule of deliveries that makes the best use of time and other resources
5	check the vehicle and insurance arrangements are current and correct
6	check that there is enough fuel for the delivery schedule and follow your retail organisation's procedures for getting more fuel if required
7	transport products and equipment safely and securely
8	deliver products at the times agreed with customers
9	take action in line with your retail organisation's procedures if the expected arrival time at customers' premises is early or late
10	follow your retail organisation's procedures for ensuring that deliveries are left only with individuals who may legally receive them

Performance criteria

11	take action in line with your retail organisation's procedures if no one is available who can receive the delivery or if customers reject a delivery, ensuring all relevant legal requirements are followed
12	unload deliveries safely and in ways that protect the products from damage
13	treat customers courteously throughout the delivery process
14	update records of delivery and non-delivery promptly and in line with your retail organisation's procedures

Unit 79: **Contribute to monitoring and maintaining ease of shopping in a retail sales area**

Unit code:	PPL.C277
SCQF level:	4
Credit points:	2

Unit summary

This standard is about contributing to making the sales area clean and tidy and to ensure the ease of shopping is monitored and maintained. It is also about making it as easy as possible for customers to move freely around the sales area and make purchases. The overall impression of a clean, tidy and uncluttered sales floor needs to be maintained without hindering customers whilst they shop.

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

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

- contribute to monitoring and maintaining ease of shopping in a retail sales area.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; contributes; contributing; monitors; maintains; facilitates; facilitating; shops; shoppers; customers; shop floors.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how the layout and appearance of the sales area influences sales
2	your retail organisation's standards for the condition of the sales area in relation to cleanliness, tidiness, health and safety, positioning, condition and presentation of merchandise, and the positioning of information concerning products and prices and promotions
3	when and how to check the sales area meets your retail organisation's standards
4	how to balance checking the sales area during trading hours with other duties
5	how to recognise when the condition of the sales area is not satisfactory and how to correct it
6	the correct person to contact if it is not possible for you to restore the condition of the sales area to the required standard
7	how to identify realistic ways to improve the condition of the sales area so as to encourage sales
8	how to spot and report problems that could have a negative effect on customers' shopping experience
9	who to inform about any customer feedback received

Performance criteria

You must be able to:

1	check the sales area at suitable times to ensure that the area is clean, tidy and free from hazards and obstructions, that merchandise is in a saleable condition and meets your retail organisation's standards for positioning and presentation and information concerning prices, products and promotions is clearly visible to customers
2	maintain the sales area to your retail organisation's standards without hindering customers from shopping
3	report promptly any problems that could have a negative effect on the customer experience
4	tell the correct person promptly about any customer feedback received

Unit 80: Prepare display areas and materials in a retail organisation in line with display plans

Unit code:	PPL.C201
SCQF level:	5
Credit points:	3

Unit summary

This standard is about preparing display areas and related materials in a retail organisation in line with display plans.

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

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

- prepare display areas and materials in a retail organisation in line with display plans.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; prepares; preparing; preparation; displays; stock; items; products; produce; goods.

Assessment outcomes and standards

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

Knowledge and understanding

You need to know and understand:

1	how to prepare display areas and materials in your retail organisation and why
2	why display requirements for stock, space, position and dates need to be clear, and where to get this information
3	who to ask for advice and help in solving problems with display plans
4	how to identify what is required for a display from plans and sketches
5	why checks for possible dangers to health and safety must be made before setting up displays
6	how to check whether displays will cause an obstruction

Performance criteria

You must be able to:

1	follow your retail organisation's procedures for clearing, cleaning and preparing the display area before use
2	identify what is required for the display in relation to stock, space, position of the display and dates
3	ask for clarification promptly when it is not clear what is required for the display
4	check that the display will not cause an obstruction, and report any problems promptly to the correct person
5	check that the display area is the right size and report any problems promptly to the correct person

Performance criteria

6	gather the materials, equipment and stock required for the display and check that they are clean, safe and in good working order
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Unit 81: Set up and dismantle displays in line with display plans in a retail organisation

Unit code: PPL.C202

SCQF level: 5

Credit points: 3

Unit summary

This standard is about setting up displays in line with display plans, and dismantling displays when they are no longer required in a retail organisation.

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

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

- set up and dismantle displays in line with display plans in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; constructs; constructing; creates; creating; dismantles; dismantling; sets up; setting up; takes down; taking down.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the value of displays and promoting new products in your retail organisation
2	how placing products in specific places attracts attention and promotes sales
3	how to use space effectively when displaying products
4	why checks must be made for possible dangers to health and safety when setting up and dismantling displays
5	how to check that any equipment to be used is in working order
6	why materials and equipment used in displays should be cleaned and stored and waste disposed of safely
7	how to identify and correct unsafe displays in your retail organisation
8	why it is important to reduce any disruption and disturbance whilst setting up and dismantling displays

Performance criteria

You must be able to:

1	set up and dismantle the display safely, in line with display plans and within the time allowed
2	check that the display is clean, tidy and safe for use once it is set up
3	check that the display has the levels of stock required
4	clean and store equipment and excess materials and dispose of waste safely, correctly and promptly
5	set up and dismantle displays with minimum disturbance to other people

Unit 82:

Label displays of stock in a retail organisation

Unit code: PPL.C203

SCQF level: 4

Credit points: 2

Unit summary

This standard is about labelling stock on display in a retail organisation so that the information given to customers is accurate, clear and meets legal requirements.

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

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

- label displays of stock in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; labels; labelling; items; products; produce; goods.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how proper labelling of displays of stock promotes sales in your retail organisation
2	the relevant legal requirements for labelling and what can happen if these are not met
3	the importance of checking that labels are clear and accurate
4	who to tell about information that may require changing on labels
5	how to use labelling materials and equipment efficiently and effectively

Performance criteria

You must be able to:

1	check the requirements for labelling displays of stock in your retail organisation
2	check that the information on the label is clear, accurate and meets relevant legal requirements before starting to label stock
3	report promptly and to the correct person any information on labels that may require changing
4	attach the correct labels to the relevant products
5	position labels so that they are securely fastened and customers can see them clearly
6	complete labelling within the time allowed

Unit 83: Interpret design briefs for retail displays

Unit code: PPL.C230

SCQF level: 5

Credit points: 3

Unit summary

This standard is for visual merchandising specialists. It is about interpreting design briefs for retail displays in a retail organisation.

This standard is for staff who are visual merchandising specialists.

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

- interpret design briefs for retail displays.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; designs; interprets; interpreting; understands; understanding; instructions; plans; layouts; visual merchandising.

Assessment outcomes and standards

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

Knowledge and understanding

You need to know and understand:

1	the role of retail displays in marketing, promotional and sales campaigns and activities
2	the importance and content of the design brief and how to interpret it
3	how to use the design brief to identify what is required for the retail display
4	different approaches to designing retail displays for different types of merchandise, and why these are effective
5	how to evaluate the potential places to put the retail display so the design brief is met
6	your retail organisation's policies for visual design

Performance criteria

You must be able to:

1	identify the purpose, content and style of the retail display when interpreting the design brief
2	identify the equipment, materials, merchandise and props required to create and install the retail display and the dates for completing it
3	evaluate whether the planned place to put the retail display is likely to fulfil the design brief

Performance criteria

- | | |
|---|--|
| 4 | create new and effective ways of improving the visual effect of retail displays, within the limits of the design brief, your retail organisation's visual design policies and the authority given to you |
|---|--|

Unit 84: Source merchandise and props to be featured in retail displays

Unit code: PPL.C231

SCQF level: 5

Credit points: 5

Unit summary

This standard is about sourcing the merchandise and props shown in the design brief that will be featured in retail displays.

This standard is for members of staff that are visual merchandising specialists.

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

- source merchandise and props to be featured in retail displays.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; design briefs; designs; items; goods; materials; products; produce; gets; getting; acquires; acquiring; sources; sourcing; models; cutouts; cut-outs; cut outs; features; featuring; displaying; visual merchandising.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the role of retail displays in marketing, promotional and sales campaigns and activities
2	how to use the design brief to identify what needs to be sourced for retail displays
3	different approaches to designing retail displays for different types of merchandise, and why these are effective
4	how light, colour, texture, shape and dimension combine to achieve the effects required
5	how to assess the potential of places to put retail displays to meet the design brief
6	your retail organisation's policies for visual design
7	the merchandiser or buyer that you need to consult about merchandise and props to be featured in retail displays
8	how to arrange delivery of merchandise and monitor the progress of deliveries
9	why stock records must be updated to account for merchandise on retail displays and how to do this

Performance criteria

You must be able to:

1	confirm that the features shown in the design brief are those most likely to attract retail customers' attention and increase sales when sourcing the merchandise and props
2	identify other merchandise and props when those originally specified are not available or not suitable and agree the selections with the correct person
3	agree arrangements for delivery of merchandise and props with the correct people, allowing enough time for deliveries to arrive before the retail display must be installed
4	check the progress of deliveries and take suitable action if delays seem likely
5	update stock records to account for merchandise on the retail display

Unit 85:

Dress in-store retail displays to guidelines

Unit code:

PPL.C232

SCQF level:

5

Credit points:

7

Unit summary

This standard is about following guidelines for dressing in-store retail displays in ways that promote sales. It involves making judgements about how best to achieve the visual effect required, while working within your retail organisation's policy for visual design.

This standard is for specialist staff who are responsible for visual merchandising.

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

- dress in-store retail displays to guidelines.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; design briefs; designs; dresses; dressing; instructions; visual merchandising.

Glossary

Policy – Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to create and use focal points within in-store retail displays
2	how to put together merchandising displays for use inside the store
3	how to choose and combine dimension, shape, colour, texture and lighting to create the visual effect required from in-store retail displays
4	how to dress mannequins, busts and other props
5	how to display different types of merchandise
6	how to choose suitable types of grouping
7	how to use different types, directions and levels of light to create atmosphere
8	how retail displays can achieve add-on sales and why this is important
9	why visual merchandise personnel are expected to install creative in-store retail displays and to be aware of trends
10	different approaches to displaying merchandise and how to choose the best approach
11	the different purposes of in-store retail displays and how they are used in visual merchandising
12	how props, prototypes, dressing and fixtures create visual effects
13	health and safety guidelines and relevant legal requirements for in-store retail displays

Knowledge and understanding

14	how to identify the selling features of merchandise to be used in in-store retail displays
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Performance criteria

You must be able to:

1	follow your retail organisation's procedures for using ladders, tools and equipment safely
2	place in-store retail displays where they will attract the attention of target retail customers
3	use the design brief to identify the focal points of in-store retail displays
4	choose shapes, colours and groupings that are suited to the purpose and style of in-store retail displays
5	dress in-store retail displays to achieve the visual effects required and that are consistent with your retail organisation's visual design policy
6	position merchandise, graphics and signs in ways that promote sales
7	check that lighting is installed in line with the design brief
8	check that finished in-store retail displays meet health and safety guidelines and relevant legal requirements

Unit 86:

Dress window displays following a retail organisation's guidelines

Unit code:

PPL.C233

SCQF level:

5

Credit points:

6

Unit summary

This standard is about following guidelines for dressing window displays in ways that promote sales and follow the retail organisation's guidelines. It involves deciding how to achieve the best visual effect, whilst working within your retail organisation's policy for visual design.

This standard is for specialist staff who are responsible for visual merchandising.

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

- dress window displays following a retail organisation's guidelines.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; design briefs; designs; dresses; dressing; instructions; windows; visual merchandising.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	what your retail organisation's guidelines are on dressing window displays
2	how to choose and combine dimension, shape, colour, texture and lighting to create the visual effects required from window displays
3	how to dress mannequins and other props
4	how to display different types of merchandise
5	how to choose suitable ways of grouping merchandise
6	how to light window displays and who in your retail organisation is responsible for installing lighting when dressing a window display
7	how window displays can achieve add-on sales and why this is important
8	why visual merchandising personnel are expected to install window displays creatively and to be aware of trends
9	why different kinds of merchandise require different approaches to window displays and why these approaches are important
10	the different purposes of window displays and how they are used in visual merchandising
11	how props, prototypes, dressings and fixtures create visual effects
12	the dressing techniques to use for different types of merchandise

Knowledge and understanding

13	health and safety guidelines for window displays
14	the relevant legal requirements that apply to pricing and ticketing
15	how to identify the selling features of merchandise to be used in window displays

Performance criteria

You must be able to:

1	position merchandise, graphics and signs following your retail organisation's guidelines and in ways that attract the attention and interest of customers
2	ensure window displays give retail customers the information they require
3	group merchandise appropriately for the purpose and style of window display, the selling features of the merchandise and the visual effect required under the design brief
4	make sure that lighting is installed in line with lighting requirements when dressing window displays
5	check that finished window displays meet health and safety guidelines and relevant legal requirements

Unit 87: Evaluate and improve retail displays

Unit code: PPL.C234

SCQF level: 6

Credit points: 6

Unit summary

This standard is about evaluating finished retail displays to see if they are suitable, easy to reach, safe and secure, sorting out any problems you identify and then considering how they could be improved.

This standard is for specialist staff who are responsible for visual merchandising personnel or those who have been allocated visual display responsibilities.

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

- evaluate and improve retail displays.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; design briefs; designs; evaluates; evaluating; assesses; assessing; improves; improving; adjusts; adjusting; visual merchandising.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to decide if items are suitable for retail displays
2	how to identify risks to items and measures to protect them
3	how to evaluate the visual effect of retail displays
4	how to make adjustments and improvements to retail displays
5	how to use scale when creating visual effects
6	why retail displays need to be evaluated and improved
7	how light, colour, texture, shape and dimension combine to achieve the visual effects required for retail displays
8	different approaches to using retail displays for different types of merchandise
9	the dressing techniques for different types of merchandise
10	how to identify the purpose of retail displays
11	your retail organisation's visual design and merchandising policies
12	the types of risk retail displays face, why these risks must be reduced as far as possible and how to do so
13	the reporting arrangements for resolving problems and reducing risks
14	the levels of your authority to change retail displays

Performance criteria

You must be able to:

1	check that all the parts of retail displays are suitable for the purpose of the retail display
2	check that retail displays meet requirements for easy access, safety and security
3	identify safety and security risks to retail displays and choose suitable ways of reducing risks
4	consider how retail displays look from all the directions from which customers will approach them
5	encourage colleagues to provide constructive comments about retail displays
6	evaluate retail displays
7	make any authorised improvements promptly that are required to achieve the required visual effects and to make retail displays safe and secure
8	check regularly retail displays' visual effects
9	report promptly to the correct person any problems and risks

Unit 88:

Order graphic materials to meet retail display requirements

Unit code: PPL.C235

SCQF level: 6

Credit points: 5

Unit summary

This standard is about ordering the right quantity and quality of graphic materials, including signs and tickets, within the available budget and checking the progress of orders to ensure that retail display requirements are met.

This standard is for staff who are visual merchandising specialists or personnel who have responsibilities for visual displays.

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

- order graphic materials to meet retail display requirements.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; orders; ordering; graphics; images; pictures; displays; visual merchandising.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how graphic materials help to make retail displays more effective
2	different ways to use graphic materials for different types of merchandise
3	how to choose graphic materials that will achieve the desired effects
4	who can supply graphic materials
5	your retail organisation's procedures for ordering graphic materials
6	how to make clear to suppliers what graphic materials are required to meet the retail display requirements
7	how to check the quantity and quality of graphic materials when they are delivered
8	how to confirm the cost limits and deadlines for buying graphic materials and the importance of following these

Performance criteria

You must be able to:

- | | |
|---|---|
| 1 | state what graphic materials are required to suppliers for retail displays |
| 2 | check that suppliers can meet the requirements of your retail organisation |
| 3 | order supplies of graphic materials promptly and within the available budget |
| 4 | check the progress of orders |
| 5 | check the quality and quantity of graphic materials when they are delivered and that they match the order |

Unit 89: Position graphic materials to support retail displays

Unit code: PPL.C236

SCQF level: 5

Credit points: 3

Unit summary

This standard is about positioning graphic materials, including signs and tickets, so that they support the purpose of retail displays and meet all relevant requirements. This standard is for staff who are visual merchandising specialists and personnel responsible for visual displays.

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

- position graphic materials to support retail displays.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; positions; positioning; places; placing; graphics; images; pictures; visual merchandising.

Glossary

Policy – Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	house style, your retail organisation's policy and relevant legal requirements for using graphic materials
2	how to identify and interpret manufacturers' branding requirements
3	how to interpret the design brief
4	how to choose where to position graphic materials to support retail displays
5	how to check that graphics and signs are safe and secure
6	how graphic materials help to attract and inform retail customers
7	different ways to use graphic materials for different types of merchandise

Performance criteria

You must be able to:

1	position graphic materials according to the following: <ul style="list-style-type: none">• design brief• house style• your retail organisation's policy on signs• manufacturers' branding requirements• legal requirements
2	position graphic materials in ways that support retail displays' intended visual effects and messages
3	check that graphic materials are positioned safely and securely and in line with relevant legal requirements

Unit 90:

Dismantle retail displays

Unit code: PPL.C237

SCQF level: 4

Credit points: 3

Unit summary

This standard is about dismantling retail displays and deciding what to do with the display parts, following safe practices.

This standard is for staff who are visual merchandising specialists and personnel with responsibilities for visual displays.

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

- dismantle retail displays.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; dismantles; dismantling; deconstructs; deconstructing; visual merchandising.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to dismantle retail displays safely
2	how to protect parts of retail displays from being damaged during dismantling
3	how to identify unwanted materials and how to dispose of them safely
4	where to return the parts of retail displays to
5	how to identify safe and approved cleaning materials and equipment to use
6	techniques for cleaning retail display sites and parts safely and thoroughly

Performance criteria

You must be able to:

1	dismantle retail displays safely
2	protect the parts of retail displays from being damaged during dismantling
3	return the parts of retail displays to the appropriate places promptly and, if required, in a saleable condition
4	dispose of unwanted materials safely and keep accurate records of this if required
5	clean display sites and parts using safe and approved cleaning materials and equipment

Unit 91: Store equipment, props and graphics for retail displays

Unit code: PPL.C238

SCQF level: 5

Credit points: 3

Unit summary

This standard is about storing retail display equipment, props and graphics and regularly checking the condition of storage facilities and stored items.

This standard is for staff who are visual merchandising specialists and personnel with responsibilities for visual displays and equipment.

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

- store equipment, props and graphics for retail displays.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; stores; storing; items; goods; materials; products; models; cutouts; cut-outs; cut outs; images; pictures; visual merchandising.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to work out the storage space required
2	how to identify requirements for protective packaging and security measures
3	how to check the condition of equipment, props and graphics for retail displays
4	how to deal with equipment, props and graphics that require repair
5	why equipment, props and graphics for retail displays must be labelled accurately
6	why records must be kept of items and where to store them
7	why equipment, props and graphics for retail displays must be stored securely
8	what suitable storage facilities are available
9	which equipment, props and graphics are required to be stored
10	possible dangers and risks to health, safety and security in relation to storage facilities and stored items
11	who to report dangers and risks to

Performance criteria

You must be able to:

1	work out accurately the storage space required
2	identify the protective packaging required and the security measures that must be in place
3	store equipment, props and graphics for retail displays in suitable places and with clear and accurate labels
4	keep accurate and up-to-date records of equipment, props and graphics in storage
5	identify damaged or missing equipment, props and graphics or any item that poses a danger or risk to health and safety, and report these promptly to the correct person
6	check that storage facilities and items in storage are clean, safe, secure and accessible only to those with authority to access them

Unit 92:

Follow guidelines for putting retail display layouts together

Unit code: PPL.C244

SCQF level: 5

Credit points: 4

Unit summary

This standard is about putting retail display layouts together accurately following the guidelines provided and introducing creative effects when appropriate.

This standard is for staff who are visual merchandising specialists and personnel with authority to put display layouts together.

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

- follow guidelines for putting retail display layouts together.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; follows; following; instructions; puts; creates; creating; assembling; assembles; designs; visual merchandising.

Glossary

Policy – your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy, then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to follow guidelines for putting retail display layouts together
2	how to identify opportunities to achieve creative effects
3	how to work creatively within your retail organisation's visual merchandising policy
4	how to identify and resolve problems when putting retail display layouts together
5	when creative effects are suitable
6	the parts required to put retail display layouts together
7	the relevant health, safety and relevant legal requirements
8	where to find the parts required for retail display layouts

Performance criteria

You must be able to:

1	check that the parts required for retail display layouts are available and in working order
2	put retail display layouts together following the guidelines, agreed deadlines, health and safety policies and relevant legal requirements
3	identify opportunities for achieving creative effects and do so within the guidelines
4	identify possible problems that may arise and take prompt and suitable action within the guidelines to resolve them

Unit 93: Organise staff to display goods for retail sale

Unit code: PPL.C301

SCQF level: 6

Credit points: 4

Unit summary

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

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

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

- organise staff to display goods for retail sale.

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 94: Assess how effective displays are in a retail organisation

Unit code: PPL.C302

SCQF level: 6

Credit points: 4

Unit summary

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

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

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

- assess how effective displays are in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 95: **Keep stock available, correctly priced and maintain quality of stock in a retail organisation**

Unit code: PPL.C303

SCQF level: 5

Credit points: 3

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 96:

Interpret requirements for retail displays

Unit code: PPL.C330

SCQF level: 5

Credit points: 2

Unit summary

This standard is about interpreting requirements to identify what is required for retail displays. Retail displays may be in-store or window displays.

This standard is for trained visual merchandising personnel.

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

- interpret requirements for retail displays.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; interprets; interpreting; determines; determining; needs; visual merchandising.

Glossary

Policy – Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to identify the purpose of retail displays from design information
2	how to identify the merchandise that will be used
3	how retail displays attract the interest of customers and persuade them to make buying decisions
4	the role of retail displays in marketing, promotional and sales campaigns and activities
5	good practice in creating retail displays that have the visual effect required
6	your retail organisation's policy for merchandising and visual design
7	sources of information about the merchandise that will be used
8	who to check the required interpretations with

Performance criteria

You must be able to:

- | | |
|---|--|
| 1 | use design information to identify the purpose of retail displays, the merchandise that will be used and how the merchandise will feature in retail displays |
| 2 | interpret the requirements for retail displays in line with your retail organisation's design policy where there is scope for interpretation |
| 3 | check any interpretations with the correct person before work starts on putting retail displays together |

Unit 97: Choose and agree retail merchandise to be featured in retail displays

Unit code: PPL.C331

SCQF level: 5

Credit points: 3

Unit summary

This standard is about choosing and agreeing retail merchandise to feature in retail displays. Displays may be in-store or window displays.

This standard is for trained visual merchandising personnel.

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

- choose and agree retail merchandise to be featured in retail displays.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; chooses; choosing; picks; picking; selects; selecting; agrees; agreeing; stock; items; products; produce; materials; features; featuring; visual merchandising.

Glossary

Policy – Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to compare selected retail merchandise with retail display requirements
2	how to check whether retail merchandise that will be featured in the retail displays is available
3	how to arrange for retail merchandise to be delivered
4	why retail displays are used to attract the interest of retail customers and persuade them to make buying decisions
5	how light, colour, texture, shape and dimension combine to achieve the visual effects required
6	why there is an expectation to show creativity in selecting merchandise for retail displays and to be aware of trends
7	how retail displays can achieve add-on sales
8	other approaches to use for displaying different kinds of retail merchandise
9	the different purposes of retail displays and their use in visual merchandising
10	your retail organisation's policy for merchandising and visual design
11	the decision-makers that need to agree the choices of retail merchandise to be featured
12	the people who can supply the retail merchandise required for retail displays

Performance criteria

You must be able to:

1	evaluate the potential of retail merchandise to attract retail customers' attention and interest
2	choose retail merchandise that is the most likely to attract and interest retail customers, meets the requirements of retail displays and is consistent with your retail organisation's visual-display policy
3	check the suitability and availability of retail merchandise that is to be featured in the displays with the relevant decision makers
4	reach agreement with decision-makers concerning realistic arrangements and timescales for supply
5	make any additional arrangements promptly to acquire retail merchandise if it is not otherwise available within the timescales and cost limits

Unit 98: Identify and obtain graphic materials for retail displays

Unit code: PPL.C332

SCQF level: 6

Credit points: 4

Unit summary

This standard is about identifying, obtaining and choosing graphic materials, including signs and tickets to make retail displays more attractive and informative to customers. This standard is for trained visual merchandising personnel.

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

- identify and obtain graphic materials for retail displays.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; identifies; identifying; gets hold; getting hold; sources; sourcing; acquires; acquiring; graphics; images; pictures; visual merchandising.

Glossary

Policy – Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to identify the requirement for graphic materials, and the factors affecting their use and style
2	how to check the interpretations of the graphic materials that you need to obtain
3	how to choose graphic materials and say how they should be used
4	how to check that proposals for graphic materials are consistent with your retail organisation's visual-design policy and aims
5	how to brief suppliers about requirements
6	the part graphic materials play in retail displays
7	the part graphic materials have in attracting retail customers and giving them information
8	approaches to using graphic materials for different types of merchandise
9	your retail organisation's visual-design policy
10	relevant legal requirements relating to graphic materials
11	the accepted ways of describing types and quantities of graphic materials so that suppliers understand what is required
12	your retail organisation's procedures and requirements for ordering graphic materials
13	who the relevant decision-makers are

Knowledge and understanding

14	who can supply graphic materials
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Performance criteria

You must be able to:

1	use the design brief and information about the layout to identify the graphic materials required for retail displays
2	identify the types and quantities of graphic materials you need to obtain and the associated costs, delivery dates and delivery addresses
3	confirm what is required with the relevant decision-makers
4	choose graphic materials that are consistent with relevant legal requirements and your retail organisation's visual-design policy
5	use the accepted ways of describing the type and quantity of graphic materials required
6	confirm that proposals for using graphic materials are consistent with your retail organisation's visual-design policy and aims and are acceptable to decision makers
7	specify clearly to suppliers what graphic materials are required for retail displays

Unit 99: Co-ordinate how graphic materials are used in retail displays

Unit code: PPL.C333

SCQF level: 6

Credit points: 4

Unit summary

This standard is about co-ordinating the distribution of graphic materials, including signs and tickets, and how they are used in retail displays.

This standard is for trained visual merchandising personnel.

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

- co-ordinate how graphic materials are used in retail displays.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; co-ordinates; co-ordinating; coordinates; coordinating; organises; organising; arranges; arranging; directs; directing; graphics; images; pictures; uses; using; visual merchandising.

Glossary

Policy – Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to confirm whether graphic materials are available
2	how to check that graphic materials are suitable for use in retail displays
3	how to produce instructions for installing graphic materials and co-ordinate how they are carried out
4	how to check that installations are satisfactory
5	the part graphic materials play in retail displays
6	the part graphic materials have in attracting and informing retail customers
7	different approaches to using graphic materials for different merchandise
8	your retail organisation's policy and relevant legal requirements for graphic materials

Performance criteria

You must be able to:

1	check that graphic materials meet specifications, relevant legal requirements and your retail organisation's policy
2	distribute graphic materials to the correct places by the agreed deadlines and co-ordinate how they are used in retail displays
3	give colleagues clear, accurate and up-to-date instructions for installing graphic materials promptly
4	check that graphic materials are correctly installed and maintained

Unit 100:

Check how graphic materials are used in retail displays

Unit code: PPL.C334

SCQF level: 5

Credit points: 2

Unit summary

This standard is about checking that graphic materials, including signs and tickets, are being used consistently with the purpose of retail displays and any relevant requirements.

This standard is for trained visual merchandising personnel.

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

- check how graphic materials are used in retail displays.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; checks; checking; looks at; looking at; graphics; images; pictures; uses; using; visual merchandising.

Glossary

Policy – Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to check how graphic materials should be used
2	how to ask for and collect comments from colleagues about using graphic materials
3	why it is important to check how graphic materials are used
4	the action to take when graphic materials are not being used correctly
5	the part graphic materials play in retail displays
6	the part graphic materials have in attracting retail customers and giving them information
7	alternative approaches to using graphic materials for different merchandise
8	what your retail organisation's policy and procedures are on how graphic materials are used in retail displays
9	your retail organisation's procedures for dealing with cases where graphic materials are not being used in line with policy

Performance criteria

You must be able to:

1	check any retail displays as far as possible and encourage colleagues to provide relevant information about using graphic materials
2	collect enough relevant information about whether graphic materials are being used suitably and effectively
3	take prompt and suitable action when graphic materials are not being used or maintained in line with your retail organisation's policy or the design brief
4	identify situations where the way graphic materials are used should change, promptly making any alterations required

Unit 101:

Gather information about retail customers' responses to displays and layouts

Unit code: PPL.C335

SCQF level: 6

Credit points: 5

Unit summary

This standard is about gathering valid and reliable information that will allow judgements to be made about whether displays and layouts are having the desired effect on retail customers and encouraging them to purchase the items being promoted.

This standard is for visual merchandising specialists and personnel responsible for gathering feedback on visual displays and layouts.

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

- Gather information about retail customers' responses to displays and layouts

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; gathers; gathering; collects; collecting; statistics; facts; figures; numbers; reactions; respond; visual merchandising

Glossary

Customers' responses:

1. whether they are attracted to the display
2. whether they show interest in the display features
3. whether they buy the goods or services featured in the display

Policy – Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to organise the gathering of information about retail customers' responses, such as sales figures, footfall and customer flow
2	how to bring together, compare and interpret information about retail customers' responses to displays and layouts
3	how to choose the information that is most useful for judging the effect of displays and layouts
4	why information about retail customers' responses to displays and layouts is required and how to use it to decide what requires improvement
5	how constantly improving the design of displays and layouts helps to attract and interest retail customers
6	how to recognise what different designs are meant to achieve and the types of retail customer they should attract
7	what customer-focused trading is
8	the meaning of 'validity' and 'reliability' in relation to retail customers' responses
9	useful sources of information about retail customers' responses
10	your retail organisation's procedures and requirements for gathering information about retail customers' responses to displays and layouts

Performance criteria

You must be able to:

1	accurately recognise when information is required about retail customers' responses, why it is required, and what type of information would be most useful
2	gather information about retail customers' responses in ways that are suitable for your purposes, in line with your retail organisation's communications policy
3	gather sufficient information to allow accurate judgements about retail customers' responses to displays and layouts to be made
4	accurately interpret information about retail customers' responses
5	assess information fairly when reviewing the effect of displays and layouts

Unit 102: Work out the price of customers' retail purchases

Unit code: PPL.C213

SCQF level: 4

Credit points: 2

Unit summary

This standard is about calculating how much customers need to pay for their retail purchases. This can be with or without the use of a payment register.

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

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

- work out the price of the customers' retail purchases.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; works out; working out; calculates; calculating; adds up; adding up; prices; pricing; totals; totalling; orders.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to identify and check prices in your retail organisation
2	how to identify any current discounts and special offers
3	where to find information and advice on pricing
4	your retail organisation's procedures for working out the price of customers' retail purchases
5	common methods of working out payments, including point-of-sale technology, electronic calculators and longhand
6	your retail customers' rights and your retail organisation's duties and responsibilities in relation to the pricing of goods

Performance criteria

You must be able to:

- | | |
|---|---|
| 1 | identify accurately the price of retail purchases |
| 2 | deal promptly with any pricing problems by referring to pricing information |
| 3 | obtain advice promptly from the right person when it is not possible for you to sort out pricing problems |
| 4 | work out accurately the amount retail customers should pay |

Unit 103: Provide a payment service at point of sale in a retail organisation

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

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 104:

Process applications from retail customers for credit facilities

Unit code: PPL.C215

SCQF level: 5

Credit points: 5

Unit summary

This standard is about processing retail customers' applications for credit facilities. This includes completion of paperwork, giving information to retail customers and carrying out the necessary checks and authorisation.

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

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

- process applications from retail customers for credit facilities.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; processes; processing; requests; requesting; facility.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the features and conditions of the credit facilities offered by your retail organisation and any other external organisations used in the application process
2	the relevant legal and your retail organisation's requirements for giving information to retail customers when offering them credit facilities
3	the relevant legal and your retail organisation's procedures for carrying out credit checks and getting authorisation for credit facilities
4	who to approach for advice and help in resolving unsuccessful applications, either internally or externally as appropriate

Performance criteria

You must be able to:

1	identify retail customers' requests for credit facilities
2	explain clearly to retail customers the features and conditions of credit facilities
3	provide enough time and opportunities for retail customers to ask for clarification or more information
4	fill in the documents required accurately to allow retail customers to obtain credit
5	carry out the necessary credit checks and authorisation procedures in order for the application to be processed
6	refer unsuccessful applications for credit facilities to the correct person promptly

Unit 105:

Process payments made to retail customer accounts

Unit code: PPL.C217

SCQF level: 5

Credit points: 4

Unit summary

This standard is about processing various forms of payment from retail customers and crediting them to retail customers' accounts.

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

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

- process payments made to retail customer accounts.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; processes; processing; pays; paying; credits; crediting; customers.

Glossary

Legal tender – Coins and notes that your retail organisation must accept in payment

Your country – England, Wales, Scotland or Northern Ireland

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the acceptable ways for retail customers to make payments
2	how to process all types of payments
3	what counts as legal tender in your country
4	how to identify counterfeit payments
5	your retail organisation's procedures for storing cash and cash equivalents securely

Performance criteria

You must be able to:

1	check that payments from retail customers are valid and accurate
2	process and record payments from retail customers promptly and accurately
3	record clearly and accurately the reasons why payments are overdue on retail customer accounts
4	identify problems accurately and resolve them promptly
5	inform the correct person promptly about any problems that cannot be resolved
6	secure payments in line with your retail organisation's procedures

Unit 106: Reconcile retail customers' accounts

Unit code: PPL.C218

SCQF level: 5

Credit points: 4

Unit summary

This standard is about reconciling retail customers' accounts, checking that account details are consistent with other financial records and identifying and sorting out problems.

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

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

- reconcile retail customers' accounts.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; processes; processing; reconciles; reconciling; checks; checking; customers.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	why accurate financial checks are required
2	how to reconcile retail customers' accounts accurately
3	the types of problems within your level of responsibility and how to identify and resolve them
4	who to approach for advice and help in sorting out problems with retail customers' accounts that are not within your responsibility and control

Performance criteria	
You must be able to:	
1	check that charges made to retail customers' accounts are correct
2	check that credits made to retail customers' accounts are correct
3	identify and sort out problems with retail customers' accounts
4	reconcile retail customers' accounts
5	tell the correct person about problems with retail customers' accounts that you cannot resolve or that are beyond your level of responsibility and control

Unit 107: Follow procedures for retail sales of age-restricted products

Unit code: PPL.C252

SCQF level: 5

Credit points: 7

Unit summary

This standard is about your responsibility for selling age-restricted products only to retail customers who are old enough to buy them legally. You need to follow the relevant law and your retail organisation's policies and procedures. You also need to refuse retail sales when necessary, in ways that follow your retail organisation's customer service standards 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
- painkilling drugs containing paracetamol, ibuprofen and aspirin.

This standard is for all staff members that sell the above items.

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

- follow procedures for retail sales of age-restricted products.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; follows; following; observes; observing; sells; selling; age restricted; restrictions; items; goods; materials; products; alcoholic; cigarettes; lottery; scratchcards; scratch cards.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	which age-restricted products your retail organisation is authorised to sell
2	the relevant legislation that governs the selling of the different age-restricted products your retail organisation sells
3	the age restrictions on the products your retail organisation is authorised to sell, and what can happen to you and your retail organisation if you fail to follow these restrictions
4	your retail organisation's policies and procedures for requesting proof of age, including the types of proof that may be accepted
5	your retail organisation's policies and procedures for refusing retail sales of age-restricted products
6	why when requesting proof of age and refusing retail sales it should be carried out in ways that are both firm and polite, and how to do so

Performance criteria

You must be able to:

1	follow relevant legal requirements and your retail organisation's policies and procedures when requesting proof of age for age-restricted products
2	when proof of the retail customer's age is required, make the retail sale only if they provide it and it meets relevant legal and your retail organisation's conditions
3	follow relevant legal requirements and your retail organisation's policies and procedures for refusing retail sales of age-restricted products
4	refuse politely and firmly to make retail sales that are against the relevant law or any of your retail organisation's procedures and policies
5	explain clearly and accurately to retail customers which type of identification for proof of age can be accepted

Unit 108: Cash up one or more payment registers

Unit code:	PPL.C269
SCQF level:	5
Credit points:	4

Unit summary

This standard is about your responsibility for cashing up one or more payment registers. This includes identifying and dealing with discrepancies. It is very important that cash and cash equivalents are kept secure when cashing up.

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

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

- cash up one or more payment registers.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; cashes up; cashes-up; cashing up; cashing-up; cashup; totalling; totals; tills.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	your retail organisation's routines and procedures for cashing up one or more cash registers
2	how to check for any discrepancies
3	the reasons why discrepancies occur
4	the level of your authority to deal with discrepancies
5	who to contact regarding those discrepancies not within your authority
6	your retail organisation's procedures for keeping cash, cash equivalents and yourself secure throughout the cashing up process
7	your retail organisation's procedures for taking cash deliveries and cash uplifts
8	what equipment to use for cashing up and how to use it safely, effectively and efficiently

Performance criteria

You must be able to:

1	cash up one or more cash registers in line with your retail organisation's routines and procedures
2	identify register discrepancies and deal with these in line with your retail organisation's procedures and within the limits of your authority
3	report discrepancies promptly to the correct person where the level of authority is above that given to you to resolve problems
4	follow your retail organisation's procedures for keeping cash, cash equivalents and yourself secure throughout the cashing up process
5	follow your retail organisation's procedures for cash deliveries and uplifts
6	use cashing up equipment safely, effectively and efficiently

Unit 109: Identify the retail customer's credit or hire-purchase requirements

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

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 110: Process credit or hire-purchase applications on behalf of retail customers

Unit code:	PPL.C308
SCQF level:	6
Credit points:	5

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 111: Monitor and support secure use of the payment register and service area in a retail organisation

Unit code: PPL.E211

SCQF level: 5

Credit points: 3

Unit summary

This standard is about your individual responsibility for maintaining the secure use of payment register and the service area in your retail organisation during trading hours. The standard refers to a single register, but can be taken to mean all the registers in service areas when you are responsible for these.

This standard is for managers, team leaders and payment point operators.

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

- monitor and support secure use of the payment register and service area in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; monitors; monitoring; watches; watching; supports; supporting; ensures; ensuring; secures; securing; registers; checkouts; check outs; uses; using; working hours; opening hours.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the payment register and service area within your area of responsibility to monitor and support
2	why it is important to keep personal data confidential
3	the data security risks that can arise at the payment register and how to minimise these
4	the types of register transactions and adjustments within your area of authority
5	how to carry out payment register transactions and adjustments within your area of authority
6	when and how to support colleagues when they require support with a range of problems
7	who can authorise a transaction that is outside your level of authority, and how to contact that person
8	how to replenish and monitor the change in the payment register, including your retail organisation's procedures for keeping cash, colleagues and yourself secure in the process
9	how to monitor the payment register and service area whilst completing other tasks
10	who is authorised to draw cash and cash equivalents from the payment register during trading hours

Performance criteria

You must be able to:

1	monitor the payment register regularly to ensure that personal data is kept confidential in the service area during opening hours
2	authorise payment register transactions and adjustments within the limits of your authority and in line with your retail organisation's procedures for: <ul style="list-style-type: none">• customer service• security• stock control.
3	support colleagues when they need assistance with transaction and security problems
4	refer payment register transactions and adjustments promptly to the correct person when these are outside your level of authority to authorise
5	replenish and monitor change requirements in the payment register in a timely fashion and in line with your retail organisation's security procedures
6	monitor the service area for security risks during all payment transactions
7	check the authorisation of anyone who draws cash or cash equivalents from the register during trading hours
8	prioritise your tasks so as to minimise customer waiting times and queue size

Unit 112: Check the accuracy of records of hours worked in a retail organisation

Unit code:	PPL.E212
SCQF level:	6
Credit points:	5

Unit summary

This standard is about checking the accuracy of records of hours worked by colleagues in your retail organisation. This can be in a store or branch of a retail organisation. It involves processing data accurately and responding to colleagues' queries politely and confidentially. It is also about observing good timekeeping and attendance and maintaining relevant data protection legislation.

This standard is for owners, managers, team leaders and personnel responsible for recording colleagues' working hours.

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

- check the accuracy of records of hours worked in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; checks; checking; confirms; confirming; accurate; discrepancies; discrepancy; working hours; payroll; pay roll; pay-roll; errors.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	why records of hours worked need to be checked
2	the records your retail organisation keeps of hours worked, and where to find these
3	the efficient and effective methods for checking data and calculations accurately
4	the discrepancies and unusual features to check for, and how to recognise these
5	why it is important to identify recurring data inaccuracies, how to do this and who needs to be informed about such problems
6	what information and reports to produce, when and how to produce them and who needs to see them
7	what it means to treat colleagues as internal 'customers' and why it is important to do this
8	the types of query within your area of responsibility and how to resolve these
9	who to refer queries to when outside your area of responsibility
10	what data processing equipment and materials to use and how to do so safely, effectively and efficiently
11	the relevant legislation and your retail organisation's procedures for keeping data protected

Performance criteria

You must be able to:

1	use efficient and effective methods of checking that data and calculations are complete and accurate
2	identify discrepancies and unusual features of data and query these promptly with the correct people
3	identify recurring data inaccuracies and report these promptly to the correct people
4	give information and reports to the correct people at the required times and in suitable formats
5	provide information and advice promptly, courteously and accurately in response to colleagues' queries about records of hours worked
6	refer colleagues' queries promptly to the correct person when they cannot be resolved within your area of responsibility
7	use data processing equipment and materials safely, effectively and efficiently
8	maintain relevant legislation and your retail organisation's procedures for keeping data protected

Unit 113: Identify and report security risks in a retail organisation

Unit code: PPL.E101

SCQF level: 5

Credit points: 3

Unit summary

This standard is about helping to protect people, property and premises by identifying and reporting security risks. Security risks are situations where people, property or premises are at risk of theft, damage or abuse in your retail organisation.

This standard is for all staff who do not have authority to handle security risks.

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

- identify and report security risks in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; identifies; identifying; spots; spotting; determine; determining; reports; reporting; hazards; dangers; threats; alerts; alerting.

Glossary

Security risks – Situations where people, property or premises are at risk of theft, damage or abuse

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	why workplace security matters
2	what can happen, to yourself and to your retail organisation, if the workplace is not kept secure
3	your responsibility for helping to keep the workplace secure by noticing and reporting security risks
4	the types of security risks to be alert for, including: shoplifting, theft by staff, aggressive customers or staff, vandalism and terrorist activity
5	how to identify security risks
6	the situations that can make other staff and yourself less alert for security risks, and how to deal with those situations
7	why security risks must be reported promptly and accurately
8	who to report security risks to and how to communicate these risks
9	the reasons to not take on more responsibility than you are authorised to when faced with security risks, including: personal safety, relevant legal considerations and your retail organisation's policy and procedures

Performance criteria

You must be able to:

1	notice and correctly identify security risks such as shoplifting, theft by staff, aggressive customers or staff, vandalism and terrorist activity
2	follow your retail organisation's procedures for reporting security risks
3	report security risks to the correct people promptly and accurately
4	follow your retail organisation's procedures for preventing security risks during work activities
5	notice when stock may have been stolen and tell the correct person about it

Unit 114: Identify and seek assistance when accidents and emergencies occur in a retail organisation

Unit code: PPL.E102

SCQF level: 5

Credit points: 3

Unit summary

This standard is about identifying the types of accident and emergency that can happen, seeking assistance and acting within the limits of responsibility given to you by your retail organisation.

This standard is for everyone working in a retail organisation.

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

- identify and seek assistance when accidents and emergencies occur in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; identifies; identifying; spots; spotting; determines; determining; reports; reporting; accidental; emergency; health; safety; alerts; alerting; responds; responding.

Glossary

Accidents – Incidents where people have been injured

Emergencies – Incidents where there is an immediate risk of people being seriously injured, or where serious injury or sudden illness has already happened

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to identify the types of accidents and emergencies that tend to happen in your retail organisation and why they happen
2	how to seek assistance in the event of accidents or emergencies
3	the actions that can safely and usefully be taken while waiting for help to arrive
4	why not to take on more responsibility than you are authorised to do when accidents and emergencies happen, including: <ul style="list-style-type: none">• personal safety• relevant legal considerations• your retail organisation's policy and procedures.

Performance criteria

You must be able to:

- | | |
|---|--|
| 1 | notice and correctly identify accidents and emergencies |
| 2 | seek assistance promptly and in the most suitable way for accidents and emergencies |
| 3 | follow your retail organisation's policy and procedures for preventing further injury while waiting for help to arrive |
| 4 | act within the limits of your responsibility and authority when accidents and emergencies arise |
| 5 | follow instructions given by senior staff and the emergency services promptly |

Unit 115: Manually lift and handle goods and materials safely in a retail organisation

Unit code: PPL.E104

SCQF level: 5

Credit points: 3

Unit summary

This standard is about manually lifting and handling goods and materials safely in your retail organisation without injuring yourself or other people.

This standard is for everyone who lifts and handles goods manually.

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

- manually lift and handle goods and materials safely in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; lifts; lifting; handles; handling; moves; moving; items; products; produce; stock; materials; safety; health.

Glossary

Goods and materials – Retail goods for sale and your retail organisation's materials such as consumables and equipment etc.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how to find out what goods and materials can be manually lifted and handled safely
2	how to find out the weight of the loads being lifted
3	the relevant and your retail organisation's guidelines for weight restrictions when manually lifting
4	approved techniques for safe handling and lifting
5	your retail organisation's guidelines and manufacturers' instructions for using lifting and handling equipment
6	why routes must be planned when moving goods
7	how to plan the route when moving goods, including the types of obstacles to look for and how to remove or avoid them
8	how using unsafe techniques for lifting and handling can affect yourself, the people assisting in a lift and others close by

Performance criteria

You must be able to:

1	take suitable safety measures before manually lifting and handling goods and materials to protect yourself and other people
2	follow the relevant weight restrictions regulations for manual lifting
3	use approved manual lifting and handling techniques whilst also following your retail organisation's procedures
4	check that any equipment needed is fit for purpose
5	use lifting and handling equipment in line with your retail organisation's guidelines and manufacturers' instructions
6	plan a safe and efficient route for moving goods
7	understand your responsibilities when requesting help from others in lifting and handling operations

Unit 116: Help maintain security in a retail organisation

Unit code: PPL.E205

SCQF level: 5

Credit points: 5

Unit summary

This standard is about helping to maintain the security of premises, stock, cash, colleagues and customers in your retail organisation. It is also about being able to recognise behaviour that puts yourself and others at risk. How to handle risks within your area of authority, following relevant legislation and your retail organisation's policies and procedures.

This standard is for team leaders, sales and storage area personnel.

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

- help maintain security in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; helps; helping; assists; assisting; keeps; keeping; maintains; maintaining; security; secures; securing; protects; protecting.

Glossary

Organisation policy – This may be a set of principles, procedures or both. These may be written or not, however owners and managers need to be clear to all personnel about what procedures should be followed and when.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the types of security risk that can arise in the workplace, including risks to other colleagues, customers, stock, premises and cash
2	your authority to help with security risks, including your legal rights and duties when colleagues, customers, stock, premises and cash are at risk
3	your retail organisation's policies and procedures for dealing with security risks in the workplace
4	who to report security risks to, and how to contact them
5	the approved procedures and techniques for protecting your personal safety when security risks arise
6	your retail organisation's policies and procedures for maintaining security during work activities
7	your retail organisation's policies and procedures for making sure that security will be maintained during breaks and at the end of a shift or close of business

Performance criteria

You must be able to:

1	take prompt and suitable action to help reduce security risks as far as possible, where it is within the limits of your responsibility and authority to do so
2	follow your retail organisation's policies and relevant legal requirements for security and act within your own level of authority when colleagues, customers, stock, premises and cash are at risk
3	recognise when security risks are beyond your authority and responsibility to resolve, and report these risks promptly to the correct person
4	use your retail organisation's procedures for protecting your personal safety when security risks arise
5	follow your retail organisation's policies and procedures for maintaining security during work activities
6	follow your retail organisation's policies and procedures for making sure that security will be maintained during breaks and the end of a shift or close of business

Unit 117:

Deal with accidents and emergencies within the limits of your own authority in a retail organisation

Unit code: PPL.E206

SCQF level: 5

Credit points: 4

Unit summary

This standard is about dealing with accidents and emergencies within the limits of your own responsibility in your retail organisation.

This standard is for team leaders, sales and storage personnel.

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

- deal with accidents and emergencies within the limits of your own authority in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; deals; dealing; copes; coping; handles; handling; responds; responding; reacts; reacting; accidental; emergency; evacuations; evacuating; health; safety.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	your retail organisation's procedures and relevant legal requirements for dealing with accidents and emergencies
2	what your own limits of authority are in your retail organisation
3	how communicating and responding calmly helps to promote safety during accident and emergency situations
4	the techniques for communicating and responding calmly while dealing with accidents and emergencies
5	how reporting accidents and emergencies promotes health and safety
6	the relevant legal and your retail organisation's requirements for reporting accidents and emergencies
7	your retail organisation's procedures for evacuation, including how the alarm is raised and where emergency exits and assembly points are

Performance criteria

You must be able to:

1	follow your retail organisation's procedures and relevant legal requirements for dealing with accidents and emergencies
2	work within the limits of your own authority as set by your retail organisation
3	communicate and respond calmly while dealing with accidents and emergencies
4	report accidents and emergencies promptly, accurately and to the correct person
5	recognise when evacuation procedures have been started and follow your retail organisation's procedures for evacuation

Unit 118: **Contribute to reducing risks to health and safety in a retail organisation**

Unit code:	PPL.E207
SCQF level:	5
Credit points:	4

Unit summary

This standard is about contributing to making your retail organisation safe for everyone who works in it or visits it. It is also about ensuring the behaviour of colleagues, customers and visitors is safe and within your retail organisation's requirements.

This standard is for team leaders, sales and storage personnel.

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

- contribute to reducing risks to health and safety in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; helps; helping; assists; assisting; reduces; reducing; limits; limiting; dangers; threats.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	the health and safety requirements laid down by your retail organisation and by law
2	how setting a good example can contribute to health and safety in the workplace
3	when health and safety is discussed in your retail organisation and how to contribute to discussions and meetings to help reduce risks
4	the limits of your authority and responsibility for dealing with health and safety risks, and the importance of not taking on more responsibility without authorisation
5	your retail organisation's approved procedures for dealing with health and safety risks
6	who to report health and safety risks to
7	what can happen to yourself and others if equipment and materials are not used correctly in line with manufacturers' instructions
8	where to find instructions for using equipment and materials

Performance criteria

You must be able to:

1	follow the health and safety requirements laid down by your retail organisation and by relevant legislation, and encourage colleagues to do the same
2	contribute to health and safety discussions and meetings and suggest ideas for reducing risks
3	take appropriate action immediately to deal with risks within your area of authorisation
4	report risks promptly to the correct person
5	use equipment and materials in line with the manufacturer's instructions

Unit 119:

Monitor and maintain security in a retail organisation

Unit code: PPL.E304

SCQF level: 5

Credit points: 5

Unit summary

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

This standard is for owners, managers and team leaders.

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

- monitor and maintain security in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	your retail organisation's security procedures to support opening, operating and closing your retail organisation's premises
2	the security threats most likely to happen in your retail organisation for the following: <ul style="list-style-type: none">• outside locations• inside the premises• stock and resources• people• cash.
3	how your retail organisation expects you to monitor and maintain the following: <ul style="list-style-type: none">• outside locations• inside the premises• stock and resources• people• cash.
4	how to identify problems with security and resolve them promptly, legally and in line with your retail organisation's requirements
5	the different methods of briefing staff about security arrangements, and when it is appropriate to use each method

Knowledge and understanding

6	who has authority to stop and search staff and customers and how to contact the relevant authorities
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Performance criteria

You must be able to:

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

Unit 120:

Take a safe and active role when accidents and emergencies occur in a retail organisation

Unit code:

PPL.E307

SCQF level:

5

Credit points:

4

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 121: Recruit and retain staff in a retail organisation

Unit code: PPL.E002

SCQF level: 6

Credit points: 7

Unit summary

This standard is about having a recruitment process that assists in retaining staff. It saves time and money and ensures new staff settle in, thus reducing staff turnover. This standard is for owners, managers, recruitment and selection personnel and team leaders.

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

- recruit and retain staff in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; SMEs; small-medium enterprises; small medium enterprises; small enterprises; medium enterprises; independents; finds; finding; keeps; keeping; recruits; recruiting; retains; retaining; workers.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	what is involved in the recruitment process and how long the process typically takes
2	how to work out what skills and personal qualities are needed for specific job roles
3	why it is important to keep a written record of what the job involves
4	the current relevant legal requirements relating to recruitment, including advertising and interviewing, and how to stay informed about these requirements
5	the relevant characteristics of the local employment market, including which kinds of employer are competing to attract the type of employee your retail organisation is looking for, and the pay, benefits and working conditions and employment contracts they typically offer
6	the different ways to advertise job vacancies, and how to work out which would be the most cost-effective and beneficial for your retail organisation to use
7	what characteristics a recruitment advertisement needs in order to attract suitable applicants
8	who is likely to be aware of any new job advertisements, such as retail customers or suppliers, and how to take their perceptions into account when preparing advertisements
9	the ways of conducting job interviews that will give all applicants a positive image of your retail organisation, whilst being realistic about the job role

Knowledge and understanding

10	the types of information that will help in assessing applicants' suitability, and legal and effective methods of getting this information
11	the current laws relating to the recording, storage and use of personal data, and how to stay informed about these laws
12	the relevant regulations and your retail organisation's procedures to recruit and inform suitable applicants
13	the relevant regulations and your retail organisation's procedures to inform unsuitable applicants
14	the kinds of support, information and training that new staff are likely to need in order to feel welcome and to perform their jobs effectively
15	how to let staff know they are valued and the effective ways of retaining key staff

Performance criteria

You must be able to:

1	allow enough time for the recruitment process so that new staff can join your retail organisation when required
2	develop a clear idea of the job required, including their duties and the skills and personal qualities staff will need before starting to recruit
3	keep a written record of the details of the job in case of later dispute
4	define terms of employment which meet relevant legal requirements, meet the needs of your retail organisation, and take into account the local employment market
5	weigh up the costs and likely effectiveness of the available methods of advertising job vacancies, including word of mouth where applicable
6	advertise job vacancies in ways which meet relevant legal requirements, are supportive of your retail organisation's brand image, and likely to attract suitable applicants
7	present your retail organisation in as positive a light as possible to applicants whilst being realistic about the job role
8	use effective and relevant legal methods of obtaining relevant information about applicants to help decide how suitable they are for the job
9	keep personal information about applicants confidential
10	use relevant regulations and your retail organisation's procedures to recruit and inform suitable applicants
11	use relevant regulations and your retail organisation's procedures to inform unsuitable applicants
12	plan for new staff to be given a positive welcome on arrival and to be given the support, information and training they will need to do their jobs effectively
13	check that new staff are settling in and deal promptly with any problems in ways that demonstrate that they are valued

Performance criteria

14	regularly tell staff how important they are to your retail organisation and check the need to do anything further to retain them
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Unit 122:

Plan and allocate work to staff in a retail organisation

Unit code: PPL.E003

SCQF level: 6

Credit points: 6

Unit summary

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

This standard is for owners, managers and team leaders.

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 123: Recommend, agree and contribute to implementing improvements to retail operations

Unit code: PPL.E302

SCQF level: 6

Credit points: 7

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 124: Plan staffing levels and prepare work schedules for a retail organisation

Unit code: PPL.E308

SCQF level: 6

Credit points: 6

Unit summary

This standard is about planning how many staff are required to be on duty in your retail organisation to maintain the best levels of customer service and profitability. It involves producing plans and schedules so that staff know when and where they will be required to work.

This standard is for owners, managers and team leaders.

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

- plan staffing levels and prepare work schedules for a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; plans; planning; workforce; numbers; prepares; preparing; working; works; hours; rotas.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	why staffing plans are required
2	the relevant laws, your retail organisation's policy and contract terms and conditions that affect the hours that staff can work
3	how to plan and calculate staffing levels that cover all operational needs and take account of operational limits
4	how to produce staffing plans and prepare work schedules that include accurate numbers and realistic levels of skill, work allocation, places where people will work, and start and finish times
5	how planning staffing levels and work schedules maintain customer service and profitability
6	your retail organisation's requirements for producing work schedules that are clear to understand and use
7	why to include realistic contingency plans to cope with abnormal situations

Performance criteria

You must be able to:

1	follow your retail organisation's procedures for checking with colleagues about the levels of staffing they require
2	follow your retail organisation's policy for contracting arrangements when preparing and planning staffing levels and work schedules
3	prepare staffing plans and schedules that cover all operational needs and take account of operational limits
4	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
5	produce staffing plans and schedules that ensure customer service and profitability is maintained
6	schedule hours of work that keep to relevant laws, your retail organisation's policy and contracts of employment
7	produce plans that are clear for the relevant people to understand and use
8	include realistic contingency plans to cope with abnormal situations

Unit 125: Monitor work targets to make changes in staffing levels in a retail organisation

Unit code:	PPL.E309
SCQF level:	6
Credit points:	5

Unit summary

This standard is about collecting and monitoring information about progress towards work targets, and making justifiable recommendations for changes in staffing levels in your retail organisation.

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

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

- monitor work targets to make changes in staffing levels in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

Retailing; retailers; monitors; monitoring; watches; watching; workforce; numbers; compares; comparing; rotas.

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	how staffing levels and the way in which staff are used can affect the work that can be done
2	how to collect, monitor and evaluate information on staffing and work targets in your retail organisation
3	how to change staffing levels and schedules
4	the factors, other than staffing, that may affect progress towards work targets, and the effect these are likely to have
5	how to justify changes in staffing levels
6	how your manner and behaviour when presenting the results of monitoring work targets are likely to influence staff's response to them

Performance criteria

You must be able to:

1	collect and organise information about the staff available and the work they are doing in your retail organisation
2	assess whether there are sufficient staff for work targets to be realistically achieved
3	monitor and collect information about what progress is being made towards achieving work targets
4	use the information about staffing and progress towards work targets to make realistic and justifiable judgements of how effective staff are
5	recommend changes in staffing clearly and promptly to the correct people
6	change staffing levels and schedules so that targets can be met
7	pass on the results of your monitoring promptly to the people who need them
8	use the results of your monitoring to encourage staff to reach their targets

Unit 126:

Help colleagues to learn in a retail organisation

Unit code: PPL.E337

SCQF level: 6

Credit points: 5

Unit summary

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

This standard is for owners, managers and team leaders.

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

- help colleagues to learn in a retail organisation.

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

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

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 127: Manage a team on a temporary basis in a retail organisation

Unit code: PPL.E338

SCQF level: 6

Credit points: 5

Unit summary

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

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

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

Knowledge and understanding	
You need to know and understand:	
1	your retail organisation's procedures and policies relating to the work of the team and the way the team's daily activities are managed, including: <ul style="list-style-type: none">• health and safety• security• staffing levels• absence reporting• timekeeping• personal appearance• handling customer complaints• laws and regulations relating to the products the team sells.
2	why to set an example to team members by following your retail organisation's procedures and policies at all times
3	how to check that team members are following your retail organisation's procedures and policies
4	what must be done when team members are not following your retail organisation's procedures and policies
5	how clear communication helps teams to work effectively
6	how to give instructions so that team members will readily understand them and feel motivated to follow them
7	why to be approachable as a team leader

Knowledge and understanding

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

Performance criteria

You must be able to:

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

Unit 128: Work productively with colleagues in a multi-channel retail organisation

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

Unit summary

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

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

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

Colleagues – those who work in any of the following:

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 129: Work with colleagues to encourage innovation in a multi-channel retail organisation

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

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

Colleagues – those who work in any of the following:

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 130:

Update product information on a trading website

Unit code:

PPL.MCR03

SCQF level:

6

Credit points:

3

Unit summary

An up-to-date and readily-searchable product database is an essential component of a successful trading website. This standard is about the role in maintaining product information databases that contribute to sales and customer satisfaction. Data concerning product details and prices must comply with any relevant legislation. This standard is for owners, managers, department managers and team leaders. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- update product information on a trading website.

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

Colleagues – those who work in any of the following:

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 131:

Provide support to individual retail customers of a trading website

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

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 132:

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

Unit code: PPL.MCR06

SCQF level: 6

Credit points: 4

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 133: Manage a social network on a trading website

Unit code: PPL.MCR07

SCQF level: 6

Credit points: 4

Unit summary

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

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

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

- manage a social network on a trading website.

Unit assessment requirements/evidence requirements

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

Keywords

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

Glossary

Access points and devices – these may include:

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

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

Colleagues – those who work in any of the following:

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 134:

Use in-store online facilities to achieve retail sales

Unit code: PPL.MCR15

SCQF level: 5

Credit points: 9

Unit summary

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

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Knowledge and understanding

- | | |
|---|--|
| 9 | the impact of relevant legislation and regulatory requirements upon the selling of products within your area of responsibility |
|---|--|

Performance criteria

You must be able to:

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

Unit 135:

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

Unit code: PPL.MCR16

SCQF level: 6

Credit points: 7

Unit summary

This standard is about advising and supporting retail customers on the use of the web-based facilities available to them within your retail organisation. This includes their use of 'kiosks', stand-alone terminals and mobile apps and how customers can use these to browse and research products, to check stock availability, to place orders, and where appropriate, to pay for their purchases. In supporting retail customers in the use of the web-based facilities, you will need to demonstrate the online processes in a manner that promotes understanding and that is sensitive to different retail customers' existing understanding and attitude to online technology.

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

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Performance criteria

You must be able to:

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

Unit 136:

Motivate colleagues to promote online retail facilities to retail customers

Unit code:

PPL.MCR17

SCQF level:

6

Credit points:

7

Unit summary

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

This standard is for all sales team members.

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

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

Unit assessment requirements/evidence requirements

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

Keywords

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

Assessment outcomes and standards

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

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

Knowledge and understanding

- | | |
|----|--|
| 11 | the sources of information within your retail organisation regarding developments in multi-channel retail online facilities affecting your retail organisation |
|----|--|

Performance criteria

You must be able to:

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

12 Further information and useful publications

Key publications:

- *Access Arrangements and Reasonable Adjustments* (Joint Council for Qualifications (JCQ))
- *Centre Guidance: Dealing with Malpractice* (Pearson)
- *Centre Guide to Quality Assurance Pearson NVQ/SVQ and Competence-based Qualifications* (Pearson)
- *Collaborative and Consortium Arrangements for the Delivery of Vocational Qualifications Policy* (Pearson)
- *Delivery Guidance and Quality Assurance Requirements for NVQ/SVQ and Competence-based Qualifications* (Pearson)
- *Enquiries and Appeals about Pearson Vocational Qualifications Policy* (Pearson)
- *Equality and Diversity Policy* (Pearson)
- *Guide for Centres to Enrolling onto Qualifications* (Pearson)
- *Quality Assurance Handbook For NVQs/SVQs And Competence-Based Qualifications* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *SCQF Credit Accumulation and Transfer Policy* (Scottish Qualifications Authority (SQA))
- *Suspected Malpractice in Examinations and Assessments Policies and Procedures* (Joint Council for Qualifications (JCQ))
- *Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units* (Pearson)
- *UK Information Manual* (Pearson)
- *Use of Languages in Qualifications Policy* (Pearson).

All of these publications are available on our website: qualifications.pearson.com

Further information and publications on the delivery and quality assurance of SVQ/competence-based qualifications are available on our website.

To order publications, please go to the resources page of our website.

For books, software and online resources for UK schools and colleges, please go to: www.pearsonschoolsandfecolleges.co.uk

13 Professional development and training

Professional development and training

Pearson supports UK and international customers with training related to our qualifications. This support is available through a choice of training options offered on our website.

The support we offer focuses on a range of issues, such as:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing learner-centred learning and teaching approaches
- building in effective and efficient quality assurance systems.

The national programme of training we offer is on our website. You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

Training and support for the lifetime of the qualifications

To get in touch with our dedicated support teams please visit our website.

Online support: find the answers to your questions by browsing over 100 FAQs on our website or by submitting a query using our Work Based Learning Ask the Expert Service. You can search the database of commonly asked questions relating to all aspects of our qualifications in the work-based learning market. If you are unable to find the information you need, send us your query and our qualification or administrative experts will get back to you. The Ask the Expert service is available on our website.

Online forum

Pearson Work Based Learning Communities is an online forum where employers, further education colleges and workplace training providers can seek advice and clarification about any aspect of our qualifications and services, and share knowledge and information with others. The forums are sector specific and cover business administration, customer service, health and social care, hospitality and catering and retail. The online forum is on our website.

14 Contact us

To get in touch with us, please visit our 'Contact us' pages for Pearson Work Based Learning customers:

<http://qualifications.pearson.com/en/support/support-for-you/work-based-learning/contact-us.html>

Appendix A: Assessment strategy



Assessment Strategy

Retail

Retail SVQs

Developed by People 1st

Approved by ACG

7 March 2018

Version

1

Introduction

The purpose of an assessment strategy is to provide awarding bodies with a consistent approach to assessment that complies with SQA Accreditation's regulatory requirements.

The key areas this assessment strategy will cover are:

- how external quality control of assessment will be achieved
- which aspects must always be assessed through performance in the workplace
- the extent to which a realistic work environment and simulated working conditions may be used to assess competence
- the occupational expertise requirements for assessors and verifiers.

Awarding bodies must use the assessment strategy as the basis for developing and defining the evidence requirements and assessment methods their providers will use. This includes specifying how the qualification will be internally and externally quality assured.

External quality control

External quality control is achieved through rigorous monitoring and standardisation of assessment decisions. Awarding bodies achieve this by operating their existing systems for quality monitoring, risk assessment and management of their approved centres, following guidance issued by the regulatory authorities.

As part of this process People 1st requires awarding bodies to:

- ensure that external verification, monitoring and support provided to centres takes into account their level of risk. For example new assessment centres, and those that are experiencing difficulty in meeting the assessment requirements, should be given additional support by their awarding body
- supply People 1st with standardised information on their statistical monitoring, including registration and certification figures, on a quarterly basis. This data will remain confidential and no individual awarding body's data will be published
- report annually on the outcomes of, and any issues arising from, external verification and quality control arrangements
- highlight specific issues relating to the assessment of the sector's SVQ units and qualifications that require immediate attention, as and when they arise
- contribute to awarding body forums to review and discuss matters relating to the assessment of retail SVQ units and qualifications
- resolve issues relating to the assessment and verification of the sector's SVQ units and qualifications with the action(s), and in the timeframe, agreed.

Workplace assessment

People 1st advocate the integration of national occupational standards within employers' organisations in order to achieve a national level of competence across the sector's labour market. As such, assessment of the sector's competence based units and qualifications will, ideally, take place within the workplace. People 1st recognise, however, that it is not always feasible for candidates to be assessed in the workplace and as such it permits the use of assessment within Realistic Working Environments (RWE). Additionally, where sector employers do not have the infrastructure to manage assessment independently, it values the role of peripatetic assessors to support the assessment process.

Within these parameters, People 1st expects that:

- the majority of assessment of the sector's SVQ units and qualifications will be based on **performance evidence**, i.e. direct observation, outputs of work and witness testimony within the workplace or a RWE approved by an awarding body. Simulation is allowed only where:
 - the assessment criteria require the learner to respond to an emergency;
 - a unit covers a limited selection of basic functions which need not involve interacting with customers; a unit originates from another SSC or SSB and the originator expressly allows simulation to be used for that unit.
- A list of those units for which simulation is allowed is appended to this document. Evidence generated from simulated activities will not be acceptable for any other unit.
- opportunities to ascertain candidate's **accreditation of prior learning** is maximised by early contact between the assessor and candidate and during initial assessment/induction period.

Please note: External tests do not form part of People 1st's assessment strategy.

Witness Testimony

People 1st recognise the use of **witness testimony** and **expert witness testimony** as appropriate methods for assessors to collect evidence of candidates' performance.

Witness testimonies can be obtained from people who are occupationally competent and who may be familiar with the national occupational standards, such as the candidate's line manager. They may also be obtained from people who are not occupationally competent, and do not have a knowledge of the national occupational standards, such as other people within the candidate's workplace, e.g. customers and suppliers. The assessor must judge the validity of the witness testimony and this may vary depending on the source.

Witness testimonies can support the assessment process but should not be used as the main form of evidence (e.g. witness testimony may be useful to authenticate a candidate's work, confirm consistency over time or confirm that a candidate has covered all of the required scope/range for a unit). In all cases the awarding body's minimum evidence requirements must be met.

Expert witnesses may be used where additional support relating to the assessment of technical competence is required. Expert witnesses may be:

- approved assessors for other sectors who are also familiar with the relevant occupational standards
- line managers, other managers or experienced colleagues that are not approved assessors, but who the awarding body agrees has current occupational competence, knowledge and expertise to make a judgement of a candidate's competence.

Expert witnesses must be able to demonstrate through relevant qualifications and/or practical experience and knowledge that they are qualified to provide an expert opinion on a candidate's performance in relation to the unit being assessed. People 1st believe that it is unlikely for an expert witness to be fully expert within any of the sector's occupational areas in less than 12 months. The final judgement on the validity of the expert witness testimony rests with the assessor and such testimonies may only be used in line with awarding body's requirements.

A list of Units for which Expert Witness Testimony is required if the assessor is not expert in the specialism covered by the unit can be found in **Annex A**.

Professional Discussion

Professional discussion could be used in addition to performance evidence to confirm a candidate's overall competence. Professional discussion could also be used as a form of evidence for assessing underpinning knowledge; such discussions should enable the assessor to gather relevant evidence to ensure the candidate has a firm understanding of the standard being assessed, rather than using a prescribed list of questions.

Realistic work environment and simulation

Simulation can only be used to assess candidates for the sector's SVQ units and qualifications where the opportunity to assess naturally occurring evidence is unlikely or not possible, for example assessment relating to health and safety, fire and emergency procedures. It should not include routine activities that must be covered by performance evidence.

There are no People 1st units that can be solely achieved by simulation. Where simulation is acceptable in the evidence requirements, it should only be used when performance evidence is unlikely to be generated through normal working practices.

See **Annex B** for SVQ units which permit the use of simulation.

Awarding bodies must issue adequate guidance which informs centres how simulation should be planned and organised, ensuring that demands on candidates are neither more nor less than they would encounter in a real work situation. In particular:

- a centre's overall strategy for simulation must be examined and approved by the external verifier
- all simulations must be planned, developed and documented by the centre in a way that ensures the simulation correctly reflects what the unit seeks to assess
- ideally, there should be a range of simulations to cover the same aspect of the standard
- the physical environment for the simulation, and the nature of the contingency, must be realistic
- the candidate should be given no indication as to what the simulation will present.

Providing a Realistic Working Environment (RWE)

Where simulation is used the sector requires that:

- Simulation must be undertaken in a Realistic Working Environment
- Awarding bodies provide guidance for centres, which requires that Realistic Working Environments:

"provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed".

A realistic working environment (for the purpose of simulated work activities) is regarded as one that replicates a real working environment. For example, a college shop that operates on a commercial basis (i.e. it has a profit and loss account) is acceptable for retail environments but a shop laid out in a classroom environment isn't. However, simulated activity may be used within a retail setting itself, for assessment purposes in order to prevent any barriers to achievement.

Occupational expertise of quality assurers

The requirements relating to the occupational expertise of assessors and verifiers is set out in Annex C.

To maintain high standards of quality and standardisation within assessment, and achieve best practice, People 1st require all external verifiers, internal verifiers and assessors to maintain a record of their **continuous professional development** – see guidance at **Annex D**.

Annex A

List of Units for which Expert Witness Testimony is required if the assessor is not expert in the specialism covered by the unit

Unit Number	Unit Title
PPL.B220	Bake (bake-off) products for sale in a retail organisation
PPL.B221	Finish bake-off products in a retail organisation
PPL.B224	Prepare greengrocery products for sale in a retail organisation
PPL.B225	Display and maintain greengrocery products to attract sales in a retail organisation
PPL.B226	Quality check the suitability of meat products for finishing in a retail organisation
PPL.B227	Prepare to finish meat products in a retail organisation
PPL.B228	Achieve meat product yield and finish in a retail organisation
PPL.B235	Maintain food safety while working with food in a retail organisation
PPL.B238	Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt
PPL.B239	Check that driver-controlled fuel transfers have been completed
PPL.B240	Receive deliveries and transfer fuel on a forecourt
PPL.B243	Organise your work to meet a dough production schedule in a retail organisation
PPL.B248	Hand-process fish in a retail organisation
PPL.B308	Monitor and contribute to improving food safety in a retail organisation
PPL.C215	Process applications from retail customers for credit facilities
PPL.C216	Set, monitor and take action with retail customers' credit accounts
PPL.C217	Process payments made to retail customer accounts
PPL.C218	Reconcile retail customers' accounts
PPL.C220	Assemble retail products at customers' premises and assist with installation and initial use
PPL.C221	Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works

Unit Number	Unit Title
PPL.C222	Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application
PPL.C230	Interpret design briefs for retail displays
PPL.C231	Source merchandise and props to be featured in retail displays
PPL.C232	Dress in-store retail displays to guidelines
PPL.C233	Dress window displays following a retail organisation's guidelines
PPL.C234	Evaluate and improve retail displays
PPL.C235	Order graphic materials to meet retail display requirements
PPL.C236	Position graphic materials to support retail displays
PPL.C237	Dismantle retail displays
PPL.C238	Store equipment, props and graphics for retail displays
PPL.C239	Confirm the requirements for props and prototypes for retail displays
PPL.C240	Make life-size copies of items for retail displays
PPL.C241	Make scale models of items for retail displays
PPL.C242	Decorate fixtures and panels for retail displays
PPL.C243	Interpret retail display layout requirements from plans, elevations and drawings
PPL.C244	Follow guidelines for putting retail display layouts together
PPL.C250	Identify the retail customers' requirements for lingerie
PPL.C251	Measure and fit retail customers for lingerie
PPL.C253	Demonstrate beauty products to retail customers
PPL.C254	Maintain the retail customer record-card system in a retail organisation
PPL.C262	Establish retail customers' requirements and provide advice regarding tiling products
PPL.C263	Advise customers upon measuring and planning for the fixing of tiles
PPL.C264	Advise customers upon the fixing of their own tiles
PPL.C266	Authorise and monitor the self-service dispensing of motor fuel on a forecourt

Unit Number	Unit Title
PPL.C267	Maintain a display of cut flowers in a retail organisation that does not specialise in floristry
PPL.C268	Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products
PPL.C270	Promote a retail organisation's own credit card to customers
PPL.C271	Offer customers information on insurance products associated with a retail organisation's credit card
PPL.C272	Help customers to apply for a retail organisation's credit card and associated insurance products
PPL.C278	Help customers to choose delicatessen products in a specialist retail organisation
PPL.C279	Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation
PPL.C306	Identify the retail customer's credit or hire-purchase requirements
PPL.C307	Advise retail customers on the features of borrowing facilities
PPL.C308	Process credit or hire-purchase applications on behalf of retail customers
PPL.C311	Make and review plans for finding new retail clients
PPL.C312	Market a retail organisation's services to potential clients
PPL.C313	Provide a consultative selling service to retail clients
PPL.C314	Provide an after-sales service to retail clients as a result of retail client consultations
PPL.C330	Interpret requirements for retail displays
PPL.C331	Choose and agree retail merchandise to be featured in retail displays
PPL.C332	Identify and obtain graphic materials for retail displays
PPL.C333	Co-ordinate how graphic materials are used in retail displays
PPL.C334	Check how graphic materials are used in retail displays
PPL.C335	Gather information about retail customers' responses to displays and layouts
PPL.C336	Assess and report the effect of retail displays and layouts

Unit Number	Unit Title
PPL.C337	Negotiate and agree costs for visual merchandising projects
PPL.C338	Record and monitor costs for visual merchandising projects
PPL.C339	Contribute to developing a retail organisation's visual-design policy
PPL.C340	Support staff putting into practice a retail organisation's visual-design policy
PPL.C341	Develop and test solutions for retail display layouts
PPL.C342	Produce guidance for putting retail display layouts together
PPL.E308	Plan staffing levels and prepare work schedules for a retail organisation
PPL.E309	Monitor work targets to make changes in staffing levels in a retail organisation
IMPCB101	Select weigh and measure ingredients in bakery operations
IMPCB105	Divide, mould and shape fermented dough in bakery operations
PPL.MCR01	Work productively with colleagues in a multi-channel retail organisation
PPL.MCR02	Work with colleagues to encourage innovation in a multi-channel retail organisation
PPL.MCR03	Update product information on a trading website
PPL.MCR05	Provide support to individual retail customers of a trading website
PPL.MCR06	Analyse feedback from retail customers of a multi-channel retail organisation when goods are returned
PPL.MCR07	Manage a social network on a trading website
PPL.MCR15	Use in-store online facilities to achieve retail sales
PPL.MCR16	Advise and support customers in a retail organisation on the use of online retail facilities
PPL.MCR17	Motivate colleagues to promote online retail facilities to retail customers
PPL.MCR18	Maintain the confidentiality and security of online data regarding retail customers

Annex B

SVQ units in Retail that permit simulation

There are no People 1st units that may be achieved solely by the use of simulation. However, partial simulation is permissible in the units listed in the table below.

The overarching principle to be applied to units identified as suitable for simulation is that it should only be undertaken in a minority of cases where:

- there is a high risk to the security or safety
- the opportunity to present evidence from work-based practice happens infrequently and therefore insisting that candidates wait for such an occurrence would be unreasonable or create blockages in the assessment system and might carry the risk of de-motivating candidates
- there would otherwise be a breach of confidentiality or privacy.

Unit number	Unit title
PPL.B101	Move goods and materials manually in a retail organisation
PPL.B102	Check stock levels in a retail organisation
PPL.C101	Package goods for customers in a retail organisation
PPL.C266	Authorise and monitor the self-service dispensing of motor fuel on a forecourt
PPL.E101	Identify and report security risks in a retail organisation
PPL.E102	Identify and seek assistance when accidents and emergencies occur in a retail organisation
PPL.E103	Maintain health and safety procedures in a retail organisation
PPL.E105	Work effectively as part of a team in a retail organisation
PPL.E106	Follow a training plan for your own learning to improve your skills and knowledge in a retail organisation
PPL.E107	Keep work surfaces clean in a retail organisation
PPL.E108	Safely remove and dispose of waste and litter in a retail organisation
PPL.E109	Maintain personal hygiene in a retail organisation
PPL.E205	Help maintain security in a retail organisation
PPL.E206	Deal with accidents and emergencies within the limits of your authority in a retail organisation
PPL.E207	Contribute to reducing risks to health and safety in a retail organisation

Unit number	Unit title
PPL.E208	Work effectively in a team to meet targets in a retail organisation
PPL.E304	Monitor and maintain security in a retail organisation
PPL.E305	Monitor, identify and investigate loss and wastage in a retail organisation
PPL.E306	Assess, monitor and control risks to health and safety and provide training in a retail organisation
PPL.E307	Take a safe and active role when accidents and emergencies occur in a retail organisation

Annex C

Occupational Expertise of Assessors and Verifiers

The requirements set out below relates to all assessors and verifiers.

✓ = mandatory

Assessors, Internal Verifiers and External Verifiers must:	A	IV	EV
Have a good knowledge and understanding of the national occupational standard and competence based units and qualifications which are being assessed or verified.	✓	✓	✓
Hold or be working towards relevant assessment and/or verification qualification(s) as identified by SQA Accreditation, qualifications regulator, confirming their competence to assess or verify SVQ units and qualifications assessment as follows:			
<ul style="list-style-type: none"> Assessors and verifiers who hold current assessor and/or verifier units and undertake appropriate continuous professional development (CPD) 	✓	✓	✓
<ul style="list-style-type: none"> Assessors and verifiers who hold previous versions of assessor and/or verifier units, who work to the current Learning and Development (L&D) National Occupational Standards (NOS) and undertake appropriate continuous professional development (CPD) 	✓	✓	✓
<ul style="list-style-type: none"> Any new assessors or verifiers who do not currently hold any assessor or verifier units must undertake the relevant current unit(s) In the case that an assessor or verifier is working towards their assessor/verifier unit, a representative sample of their assessment/verification decisions must be counter-signed by a colleague who has achieved an appropriate assessor/verifier unit. This colleague should have the same occupational expertise. 	✓	✓	✓

Assessors, Internal Verifiers and External Verifiers must:	A	IV	EV
Have relevant occupational expertise and knowledge, at the appropriate level of the occupational area(s) they are assessing and/or verifying which has been gained through 'hands on' experience in the industry.	✓	✓	✓
Adhere to the awarding body's assessment requirements and practice standardised assessment principles.	✓	✓	✓
Have sufficient resources to carry out the role of assessor or verifier, i.e. time and budget.	✓	✓	
Have supervisory/management, interpersonal and investigative skills; including the ability to analyse information, hold meetings, guide, advise, plan and make recommendations at all levels, taking into account the nature and size of the organisation in which assessment is taking place. High standards of administration and record keeping are also essential.		✓	✓
Hold qualifications, or have undertaken training, that has legislative relevance to the competence based units and qualifications being assessed (see Annex D).	✓	Good practice	Good Practice
Update their occupational expertise and industry knowledge in the areas being assessed and verified through planned Continuous Professional Development (see Annex E).	✓	✓	✓

Annex D

Continuous Professional Development for Assessors and Verifiers

It is necessary for assessors and verifiers to maintain a record of evidence of their continuous professional development (CPD). This is necessary to maintain currency of skills and understanding of the occupational area(s) being assessed, and can be achieved in a variety of ways. It should be a planned process, reviewed on an annual basis, for example as part of an individual's performance review.

Assessors and verifiers should select CPD methods that are appropriate to meeting their development needs. The following provides examples of a variety of methods that could be used for CPD purposes.

Updating occupational expertise	<ul style="list-style-type: none">• Internal and external work placements• Work experience and shadowing (e.g. within associated departments)• External visits to other organisations• Updated and new training and qualifications• Training sessions to update skills• Visits to educational establishments• Trade fairs
Keeping up to date with sector developments and new legislation	<ul style="list-style-type: none">• Relevant sector websites• Membership of professional bodies• Papers and documents on legislative change• Networking events• Seminars, conferences, workshops, membership of committees/working parties (e.g. People 1st events), webinars, social media• Staff development days
Standardising and best practice in assessment	<ul style="list-style-type: none">• Regular standardisation meetings with colleagues• Sharing best practice through internal meetings, newsletters, email circulars• Comparison of assessment and verification in other sectors• Attending awarding body meetings/seminars

Downloadable guidance on CPD can be found at CPD Guidance (<https://set.foundation.co.uk/professionalism/cpd/>)

Core Skills Signposting

Retail Sector

Qualification Titles:

SVQ Retail Skills at SCQF Level 4

SVQ Retail Skills at SCQF Level 5

SVQ Retail (Management) at SCQF Level 6

SVQ Retail (Sales Professional) at SCQF Level 6

SVQ Retail (Visual Merchandising) at SCQF Level 6

Developed by People 1st

Approved by ACG – 7 March 2018

Version 1

Introduction

Core Skills signposting indicates if there are opportunities within units to develop Core Skills in the workplace to a specified SCQF level. The signposting document should also acknowledge where there are no opportunities to develop Core Skills. This signposting can be used by providers and assessors to plan the development and assessment of Core Skills. All numbers in the columns refer to the SCQF level – any blanks indicate there is no opportunity.

The five Core Skills are:

- Communication
- Information and Communication Technology
- Numeracy
- Problem Solving
- Working with Others

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
CFACSA4	Give customers a positive impression of yourself and your organisation	4			3	3
CFACSB10	Organise the delivery of reliable customer service	4	3	3	5	5
CFACSB11	Improve the customer relationship	5	4	4	6	5
CFACSD2	Support customer service improvements	5			5	5
CFACSD8	Work with others to improve customer service	5			6	6
CFACSD11	Lead a team to improve customer service	5			4	6
IMPCB101	Select weigh and measure ingredients in bakery operations	4		4	3	
IMPCB105	Divide, mould and shape fermented dough in bakery operations	3		3	3	
PPL.B101	Move goods and materials manually in a retail organisation	3		3		4
PPL.B102	Check stock levels in a retail organisation	3		3		
PPL.B103	Replenish stock on the sales floor in a retail organisation	3		3		3
PPL.B105	Sort and prepare donated goods in a retail-charity organisation for selling or recycling	3				
PPL.B201	Prepare to receive deliveries in a retail organisation	4		3	3	3

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.B202	Receive deliveries and check storage arrangements of goods in a retail organisation	4	3	3	3	3
PPL.B204	Put goods into storage in a retail organisation	3		3		
PPL.B205	Check the level of goods on sale in a retail organisation	4	3	4	3	3
PPL.B206	Replenish goods on sale in a retail organisation	3	3	4	4	3
PPL.B207	Check the availability of goods for customer orders	4		4	4	4
PPL.B208	Process orders for retail customers	4	3	4	3	4
PPL.B209	Assist retail customers who need to return goods	4		3	4	4
PPL.B210	Process refunds and returns of retail goods	4	3	3	3	4
PPL.B212	Prepare and assemble products for selling to retail customers	4		3	3	
PPL.B220	Bake (bake-off) products for sale in a retail organisation	3		4		
PPL.B221	Finish bake-off products in a retail organisation	3		3		
PPL.B224	Prepare greengrocery products for sale in a retail organisation			3		
PPL.B225	Display and maintain greengrocery products to attract sales in a retail organisation			3		

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.B226	Quality check the suitability of meat products for finishing in a retail organisation	3		3		
PPL.B227	Prepare to finish meat products in a retail organisation	none				
PPL.B228	Achieve meat product yield and finish in a retail organisation	3		3		
PPL.B235	Maintain food safety while working with food in a retail organisation	4		3		
PPL.B238	Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt	4		4	4	3
PPL.B239	Check that driver-controlled fuel transfers have been completed	3		3		3
PPL.B240	Receive deliveries and transfer fuel on a forecourt	3		3	4	3
PPL.B243	Organise your work to meet a dough production schedule in a retail organisation	3		3	3	3
PPL.B245	Pick goods to fulfil customer orders in a retail organisation	4	3	4	3	
PPL.B246	Assist in loading customer orders for despatch in a retail organisation	4				4
PPL.B247	Count stock levels and resolve problems with stock levels in a retail organisation	4	3	4	4	4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.B248	Hand-process fish in a retail organisation			3		
PPL.B301	Organise staff to receive, check and record incoming deliveries in a retail organisation	5		4	4	6
PPL.B302	Manage staff and maintain stock records in a storage facility in a retail organisation	5	4	4	4	6
PPL.B303	Check the storage and care of stock in a retail organisation	5	4	4	4	6
PPL.B304	Organise an audit programme and put it into practice with a team in a retail organisation	5	5	4	5	6
PPL.B305	Investigate problems and report the findings of stock audits in a retail organisation	5	5	4	6	5
PPL.B306	Choose and contract with suppliers and order stock in a retail organisation	5	4	5		5
PPL.B307	Check and evaluate the performance of suppliers of stock	4	4	5	4	5
PPL.B308	Monitor and contribute to improving food safety in a retail organisation	5	4	4	5	6
PPL.C101	Package goods for customers in a retail organisation	3		3		4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C201	Prepare display areas and materials in a retail organisation in line with display plans	3		3		4
PPL.C202	Set up and dismantle displays in line with display plans in a retail organisation	3		3		4
PPL.C203	Label displays of stock in a retail organisation	3			3	
PPL.C204	Help retail customers find products	4				5
PPL.C205	Help retail customers choose products	5				5
PPL.C206	Identify opportunities to increase sales of particular products	5	5	5		4
PPL.C207	Promote particular retail products	5		5		4
PPL.C208	Provide information and advice to meet the requirements of retail customers	5			4	4
PPL.C209	Help retail customers resolve complaints	5			4	5
PPL.C213	Work out the price of customers' retail purchases			4	4	4
PPL.C214	Provide a payment service at point of sale in a retail organisation	4	4	4		4
PPL.C215	Process applications from retail customers for credit facilities	4	3			4
PPL.C217	Process payments made to retail customer accounts	4	4	4	4	4
PPL.C218	Reconcile retail customers' accounts	4	4	5	4	4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C220	Assemble retail products at customers' premises and assist with installation and initial use	5				4
PPL.C221	Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works	5				4
PPL.C222	Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application	4				4
PPL.C223	Check the customers' preferences and buying decisions when making retail sales	5				4
PPL.C224	Provide assistance at the self-service payment point in a retail organisation	4	3		4	4
PPL.C230	Interpret design briefs for retail displays	4				
PPL.C231	Source merchandise and props to be featured in retail displays	4		3	4	4
PPL.C232	Dress in-store retail displays to guidelines	4				
PPL.C233	Dress window displays following a retail organisation's guidelines	none				
PPL.C234	Evaluate and improve retail displays				3	4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C235	Order graphic materials to meet retail display requirements	4		3		4
PPL.C236	Position graphic materials to support retail displays	4				
PPL.C237	Dismantle retail displays	none				5
PPL.C238	Store equipment, props and graphics for retail displays	3		3	3	
PPL.C239	Confirm the requirements for props and prototypes for retail displays	4		4		
PPL.C240	Make life-size copies of items for retail displays	4		4		
PPL.C241	Make scale models of items for retail displays	4		6		
PPL.C242	Decorate fixtures and panels for retail displays	3		5		
PPL.C243	Interpret retail display layout requirements from plans, elevations and drawings	4		5	4	
PPL.C244	Follow guidelines for putting retail display layouts together	4			4	
PPL.C250	Identify the retail customers' requirements for lingerie	4				4
PPL.C251	Measure and fit retail customers for lingerie	4		4	4	5
PPL.C252	Follow procedures for retail sales of age-restricted products	4		3	4	4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C253	Demonstrate beauty products to retail customers	5				5
PPL.C254	Maintain the retail customer record-card system in a retail organisation	4		4		4
PPL.C262	Establish retail customers' requirements and provide advice regarding tiling products	4		4		5
PPL.C263	Advise customers upon measuring and planning for the fixing of tiles	5		5		5
PPL.C264	Advise customers upon the fixing of their own tiles	5		4	3	5
PPL.C266	Authorise and monitor the self-service dispensing of motor fuel on a forecourt		3	3	4	
PPL.C267	Maintain a display of cut flowers in a retail organisation that does not specialise in floristry	4				4
PPL.C268	Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products	5				5
PPL.C269	Cash up one or more payment registers		3	4	3	
PPL.C270	Promote a retail organisation's own credit card to customers	5		4		4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C271	Offer customers information on insurance products associated with a retail organisation's credit card	5		4		4
PPL.C272	Help customers to apply for a retail organisation's credit card and associated insurance products	5	4	4		4
PPL.C273	Use the dressing room facilities to create sales opportunities	4		3	3	4
PPL.C274	Keep dressing room facilities ready for customer use				3	
PPL.C275	Promote sales of food or drink products by offering samples to customers and following relevant food safety requirements	4			3	4
PPL.C276	Deliver products to customers' premises making the best use of time and resources	4		3	3	4
PPL.C277	Contribute to monitoring and maintaining ease of shopping in a retail sales area				3	4
PPL.C278	Help customers to choose delicatessen products in a specialist retail organisation	5		3		4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C279	Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation	3		4		4
PPL.C280	Demonstrate products to customers in a retail organisation	5				4
PPL.C301	Organise staff to display goods for retail sale	5				6
PPL.C302	Assess how effective displays are in a retail organisation	5				5
PPL.C303	Keep stock available, correctly priced and maintain quality of stock in a retail organisation	5	4	4	4	4
PPL.C306	Identify the retail customer's credit or hire-purchase requirements	5	4	5		4
PPL.C307	Advise retail customers on the features of borrowing facilities	5	4	4		4
PPL.C308	Process credit or hire-purchase applications on behalf of retail customers	5	3	4	3	4
PPL.C309	Evaluate takings practices and procedures in a retail organisation	5	4	5	5	5

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C310	Monitor practices and procedures at the payment point in a retail organisation	5	4	5	5	5
PPL.C311	Make and review plans for finding new retail clients	5	4	4	5	5
PPL.C312	Market a retail organisation's services to potential clients	5	4			6
PPL.C313	Provide a consultative selling service to retail clients	5	4	4		6
PPL.C314	Provide an after-sales service to retail clients as a result of retail client consultations	5	4	3	3	4
PPL.C315	Decide on the value of items offered in part-exchange by retail customers	4		4	3	5
PPL.C316	Negotiate part-exchange sales transactions with retail customers	5		4	3	5
PPL.C330	Interpret requirements for retail displays	4				4
PPL.C331	Choose and agree retail merchandise to be featured in retail displays	4			3	4
PPL.C332	Identify and obtain graphic materials for retail displays	4		4		4
PPL.C333	Co-ordinate how graphic materials are used in retail displays	4		4		5

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C334	Check how graphic materials are used in retail displays	4			4	4
PPL.C335	Gather information about retail customers' responses to displays and layouts	5	4	5		4
PPL.C336	Assess and report the effect of retail displays and layouts	4	4	5	5	4
PPL.C337	Negotiate and agree costs for visual merchandising projects	6	4	5	4	5
PPL.C338	Record and monitor costs for visual merchandising projects	4	4	5	4	4
PPL.C339	Contribute to developing a retail organisations visual-design policy	5	4	5	5	4
PPL.C340	Support staff putting into practice a retail organisation's visual-design policy	5		4	4	5
PPL.C341	Develop and test solutions for retail display layouts	5	4	4	4	4
PPL.C342	Produce guidance for putting retail display layouts together	5	5	5	3	4
PPL.C355	Help customers to choose specialist products in a retail organisation	5		4	3	4
PPL.C356	Demonstrate specialist products to customers in a retail organisation	5				4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C412	Monitor and improve customers' experience of a retail organisation	5		4		5
PPL.D002	Develop effective relationships with customers within a retail organisation	5	4	5	4	5
PPL.D004	Monitor and resolve customer complaints within a retail organisation	5			4	4
PPL.E002	Recruit and retain staff in a retail organisation	5	4	4	4	5
PPL.E003	Plan and allocate work to staff in a retail organisation	4		3	3	5
PPL.E101	Identify and report security risks in a retail organisation	4		3	3	3
PPL.E102	Identify and seek assistance when accidents and emergencies occur in a retail organisation	3			3	3
PPL.E103	Maintain health and safety procedures in a retail organisation	3				3
PPL.E104	Manually lift and handle goods and materials safely in a retail organisation	3		3		3
PPL.E105	Work effectively as part of a team in a retail organisation	4		3	3	4
PPL.E106	Follow a training plan for your own learning to improve your skills and knowledge in a retail organisation	4			3	4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.E107	Keep work surfaces clean in a retail organisation	3				3
PPL.E108	Safely remove and dispose of waste and litter in a retail organisation	3				3
PPL.E109	Maintain personal hygiene in a retail organisation	None				
PPL.E205	Help maintain security in a retail organisation	3			3	3
PPL.E206	Deal with accidents and emergencies within the limits of your authority in a retail organisation	4			3	3
PPL.E207	Contribute to reducing risks to health and safety in a retail organisation	4			3	3
PPL.E209	Improve the way you learn in a retail organisation	4			4	4
PPL.E210	Prepare newspapers and magazines for return to the merchandiser	3		3		
PPL.E211	Monitor and support secure use of the payment register and service area in a retail organisation	3	3	4	4	4
PPL.E212	Check the accuracy of records of hours worked in a retail organisation	4	4	4	4	4
PPL.E301	Identify and analyse opportunities for solving problems and improving retail operations	5	5	5	6	4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.E302	Recommend, agree and contribute to implementing improvements to retail operations	5	4	4	4	5
PPL.E304	Monitor and maintain security in a retail organisation	4			4	4
PPL.E305	Monitor, identify and investigate loss and wastage in a retail organisation	5	4	5	5	4
PPL.E306	Assess, monitor and control risks to health and safety and provide training in a retail organisation	5	4	4	4	4
PPL.E307	Take a safe and active role when accidents and emergencies occur in a retail organisation	4				4
PPL.E308	Plan staffing levels and prepare work schedules for a retail organisation	4	4	4	4	4
PPL.E309	Monitor work targets to make changes in staffing levels in a retail organisation	5	3	4	4	4
PPL.E314	Monitor the service provided to customers by external suppliers of a retail organisation	4		3	4	4
PPL.E315	Evaluate and improve external suppliers service to customers of a retail organisation	4	3	4		4
PPL.E335	Support effective team working in a retail organisation	5			4	6

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.E336	Contribute to the planning, organisation and evaluation of your own learning in a retail organisation	5		4		4
PPL.E337	Help colleagues to learn in a retail organisation	5				5
PPL.E338	Manage a team on a temporary basis in a retail organisation	5		3	5	6
PPL.MCR01	Work productively with colleagues in a multi-channel retail organisation	5	4		4	5
PPL.MCR02	Work with colleagues to encourage innovation in a multi-channel retail organisation	5	4		4	5
PPL.MCR03	Update product information on a trading website	5	5	4	4	5
PPL.MCR05	Provide support to individual retail customers of a trading website	5	4	4	4	4
PPL.MCR06	Analyse feedback from retail customers of a multi-channel retail organisation when goods are returned	5	4	5	4	4
PPL.MCR07	Manage a social network on a trading website	5	5		4	5
PPL.MCR15	Use in-store online facilities to achieve retail sales	5	5	4	4	5

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.MCR16	Advise and support customers in a retail organisation on the use of online retail facilities	5	5		4	5
PPL.MCR17	Motivate colleagues to promote online retail facilities to retail customers	5	5		4	5
PPL.MCR18	Maintain the confidentiality and security of online data regarding retail customers	5	4	3	4	4

All numbers refer to SCQF level – any blanks indicate no opportunity

April 2019

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