

Retail knowledge

Level 1: Understanding customer service in the retail sector (T/502/5819)

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This material is provided as an additional and optional resource for tutors and teachers to use and adapt when delivering a programme of units for their learners. For learners to achieve units within a Skilled for Life programme, it is important that every assessment criterion is assessed, fully met and noted. The resource sheets provided for each unit will enable learners to produce evidence for certain criteria. It is not envisaged that solely by completing the resource sheets, learners will fully meet all the criteria. It is the responsibility of tutors and assessors to ensure that all criteria are properly assessed and the evidence recorded appropriately.

Introduction

Our Skilled for Life resources are designed to provide you with ideas for delivering the unit content and engaging tasks and activities that will help learners work towards assessment.

The materials consist of stand-alone sheets that can be used in a range of ways to suit most situations. Whether you are working in a classroom or a less formal learning environment, with individual learners or with groups, it is hoped that you will find these sheets and the accompanying tutor guidance notes useful.

The sheets are in pdf format; they are downloadable and may be photocopied for use only within your institution. Alternatively, learners can access them on-screen – the write-in sections are interactive so that answers to activities can be recorded electronically.

Each sheet addresses one or more of the assessment criteria in the unit (A.C.s are clearly marked at the top of each page). Page 1 of each sheet provides a starter stimulus or introductory idea based around the suggested unit content in the specification; it can be used to explain key concepts, or as the basis for a discussion. You could use the stimulus to draw together key learning points and encourage learners to engage with the topic or concept from the outset. There is plenty of scope for you to introduce your own content or ideas as well.

Page 2 of each sheet includes tasks that will consolidate learners' knowledge and understanding and, in some cases, may provide evidence for assessment.

This tutor guidance document provides detailed suggestions for how to use each of the resource sheets in the unit, and includes tips and advice together with suggested extension activities, alternative ideas, useful reference sources and answers to activities where applicable.

Unit overview

This unit aims to provide learners with a knowledge and understanding of retail customer service. They will be introduced to the importance of clear communication and explore how to ensure customers receive a good impression of the retail business and the staff who work there. Learners will also discover how to adapt their approach when handling different situations, including customer complaints and problems.

Learning and teaching activities in this unit

Resource sheet 1: How to help a customer

The purpose of this sheet is to introduce learners to the concept of customer service in a retail business. Learners are encouraged to explore what constitutes good customer service and the effect that it can have on customers.

Distribute the resource sheet and use the visual stimulus to generate a discussion about the factors involved in customer service. The image shows a character – Jack – who is serving a customer at the computer store where he works. He is smartly dressed, wearing a uniform with a name badge, and demonstrating positive and welcoming body language by smiling and maintaining an open stance. Ask learners to contribute ideas about what constitutes customer service. Encourage them to recognise that the factors can be divided into what they do and how they act; for example, meeting customer needs by providing information or handling enquiries versus personal qualities such as active listening or politeness. Record ideas from the group on a flipchart or whiteboard.

You may wish to arrange a trip to a local town or city centre. Learners can investigate the customer service available at a range of different retail businesses and explore how the levels of service affect their experience in the store.

Activity 1: What should you do?

In this activity, learners must answer the question 'What is customer service?'. They are then given a simple scenario involving the character from the resource sheet. Learners must complete the spider diagram with their own ideas of how Jack can offer customer service.

Resource sheet 2: Why is customer service important?

The purpose of this sheet is to develop the discussion about customer service and explore why it is so important in the retail environment. Learners will need to think about the consequences of both good and bad customer service on a retail business.

Distribute the resource sheet and initiate a discussion about the learners' own experience with customer service. Ask learners how they feel when they are served by someone who is open and friendly – like Jack. Contrast this by exploring any negative experiences they may have had with customer service, such as rudeness, poor listening, inattention or off-putting body language. Encourage learners to recognise that good customer service has a positive impact on the customer, the employee and the retail business.

Ask learners to contribute ideas about why customer service is important and explore whether each reason is relevant to the employee, the customer or the business. You may wish to create a key words table on a flipchart or whiteboard.

Activity 2: How did Jack do?

In this activity, learners see the positive feedback that Jack received from his manager. The sheet allows them to record evidence of their understanding of the importance of customer service. They must answer two questions:

- Why is Jack's manager pleased?
- How could Jack's customer service help the store?

Learners can write or type directly into the answer fields. Alternatively, they can attach notes to the sheet.



Extension activity

To supplement the existing activity, learners can be asked to prepare and populate a three-column table for display as a poster or on a flipchart, showing the importance of good customer service to Jack, his customer and the computer store where he works.

Importance of customer service to...		
...Jack	...his customer	...the store
<learner answer>	<learner answer>	<learner answer>

Resource sheet 3: Going shopping

The purpose of this sheet is to introduce learners to the factors that create a positive first impression of a retail business. The image on the resource sheet shows an elaborate window display at a fashion store.

Distribute the resource sheet and initiate a discussion about the learners' favourite shops. Explore the reasons why and how the store makes them feel, then expand on this discussion to include ideas about how customers receive their first impression of a retail business. Often, it will be from outside the store via a window display or posters. Remind learners that the home page for online businesses, or those with e-shops, serves the same purpose as the window display on the high street.

Encourage learners to explore how first impressions can be both positive and negative. What factors may lead to a positive first impression? What factors might lead to a negative first impression? What might be the impact on the customer of both positive and negative impressions? Record ideas on a flipchart or whiteboard.

Learners can discuss their own experiences in differing retail environments. You may wish to organise a visit to a local town or city centre to explore a variety of retail outlets. If this is not possible, learners can view the websites of a variety of online stores and assess their first impressions. Ask learners to produce an assessment checklist based on ideas generated in an initial discussion against which they can assess the retail environments they visit (either physically or virtually). This feedback can be shared with the rest of the group, to initiate a deeper discussion about the impact of first impressions on the customer.

Activity 3: Is this a good shop?

In this activity, learners are shown the interior of a homewares store. There is quite a bit wrong with the display and plenty of room for improvement. Learners are asked to circle the things that are wrong or in need of improvement. They are then asked to make suggestions about how the store could improve their display to make a better first impression on their customers.

Learners can discuss the questions in pairs or small groups before recording their individual answers on the activity sheets.

Resource sheet 4: Service with a smile

The purpose of this sheet is to introduce learners to the factors that create a positive first impression of the staff of a retail business. Jack, the computer store employee from Resource sheets 1 and 2, is shown here in

cut-out, to allow learners to focus on his appearance and body language.

This resource sheet is closely linked with Resource sheet 3; you may wish to incorporate Resource sheet 4 in the earlier discussion. If you are able to plan a visit to a local town or city centre to look at different retail outlets, it would be advisable to ask learners to observe the appearance and behaviour of the staff at the same time.

Introduce the topic by distributing the resource sheet and encouraging the learners to look closely at the image of Jack. Initiate a discussion to draw out the factors that contribute to a positive first impression, such as his neat appearance, the name badge, his smile, his welcoming appearance and his open body language. Encourage learners to explore their own experiences (both positive and negative) of staff in retail businesses. How did their experiences make them feel? Did their experience change their decision to make a purchase?

You may also wish to organise for a visiting speaker, such as the human resources manager from a retail group, to talk about the importance of personal presentation and to emphasise how this benefits the company, staff and customers.

Activity 4: Can you help Sasha?

In this activity, learners are shown an image of Sasha. They must record their impressions of what is wrong with Sasha's uniform, make suggestions about how Sasha can present herself better and then answer a question about how staff in a retail business can give customers a good impression of the shop.

For question 1, learners can make notes in the space provided or circle the issues on the image of Sasha. Learners can discuss the questions in pairs or small groups before recording their individual answers on the activity sheets.

Resource sheet 5: What do they need?

The purpose of this sheet is to allow learners to identify both the types of service that customers may need and the main ways of meeting those needs.

Introduce the session by asking learners about their needs when out shopping and questions they have asked. Distribute the resource sheet and explore the customer questions provided. Ask learners to contribute suggestions about the different customer services they may be called on to provide.

It is important for learners to recognise that each customer is different and will have different needs. They must be aware of customers with disabilities and how they can meet their needs. Video sharing websites may have useful resources to initiate discussion: search for the “We Assist Customer Service Program”.

Use the customer questions to initiate role-plays to allow the learners to practise their customer service skills. Divide the class into groups of three: an employee, a customer and an observer. Provide each group with a customer question. Ask them to role-play two opposing scenarios: a perfect example of customer service and a disaster scenario. Groups should rearrange the roles between scenarios and discuss the outcome of each scenario, with each participant exploring how the role-play made them feel.

Activity 5: How can you help?

In this activity, learners are given a customer scenario and must explain how they can help. They must then list their ideas for other services that customers may need and provide details of how they can help to meet each need.

Resource sheet 6: Using words

The purpose of this sheet is to introduce the learner to the types of written communication they must use in order to provide good customer service.

Introduce the session by writing an illegible message on a flipchart or whiteboard and asking the learners for their response. How useful is your message? How does it make them feel?

Prepare the resource sheet by cutting out the cards containing examples of written communication used in retail customer service.

Distribute the cards. You may wish to divide the class into smaller groups and provide each group with one or two cards for discussion. Alternatively, hold up each card in turn and ask the whole group for their responses. Take each card in turn and initiate a discussion about the appropriate time/place to use this form of written communication. Ask learners to identify the purpose of each type of communication.

All of these forms of communication give information to the customer. However, it is important for the learner to recognise that this information is only useful if it is clear and accurate, if correct spelling and grammar is used, and if the tone adopted is polite and respectful.

Activity 6: Customer questions

In this activity, learners are presented with a series of customer questions. In each case, they must identify the form of written communication that contains the information they need to answer the question. Individual answers can be recorded on the sheet. Alternatively, provide each learner with a set of cards from the resource sheet and ask them to select the correct card for each customer question.

To answer the final question, learners must provide their own suggestions for how good written communication can help with customer service.

Resource sheet 7: How are these people communicating?

The purpose of this sheet is to introduce the learner to other forms of communication in customer service: spoken communication, body language, questioning and active listening.

The images on the resource sheet show Jack and Sasha demonstrating positive and negative examples of body language accordingly. Distribute the resource sheet and initiate a discussion about the effect of these two individuals. How would learners feel if they encountered them in a store?

The following suggestions cover alternative ways to help learners engage with these forms of communication:

- Divide learners into pairs and arrange the room so they can sit opposite each other. Ask them to carry out a conversation. At intervals, call out orders that they must follow as the conversation continues; for example, make eye contact, avoid eye contact, smile, frown, cross your arms, uncross your arms etc. Ask the learners to discuss how they felt during the conversation and how the body language impacted on their experience.
- Read the same sentence out loud to the group using four different tones of voice; for example, softly, loudly, angrily, as an order, shyly or using a monotone. Ask learners how each example made them feel.
- Use the customer questions from Resource sheet 6 to initiate role-plays to allow learners to practise their spoken communication, questioning and listening skills, and appropriate body language. Explore both positive and negative examples to allow learners to experience how negative communication makes them feel. You may wish to use an observation record to capture evidence for assessment.

Learners need to recognise that their communication skills and behaviour will have an effect on the customer.

Activity 7: Getting information

In this activity, learners are given a scenario about a customer, Mrs Williams, who wishes to buy a laptop for her son. They must answer a series of questions covering the importance of spoken communication and body language, the type of questions they should ask to determine the customer's needs and the importance of active listening.



Extension activity

Learners can build on the activity sheet by taking part in a role-play to demonstrate the skills they have highlighted in their answers to the questions. Each learner should take it in turns to play the roles of both Mrs Williams and the employee at the computer store. Generate evidence using detailed authenticated testimonies or by completing an observation record.

Resource sheet 8: When things go wrong

The purpose of this sheet is to introduce learners to the main types of customer complaints and problems encountered in the retail environment and to encourage them to identify solutions. The images shown on the resource sheet represent three of the major issues encountered in the store: breakages, spillages and the return of faulty goods.

Distribute the resource sheet and ask learners to consider each of the scenarios shown. What other examples of customer complaints or problems can they think of? Learners can discuss their ideas with the group: space has been provided on the sheet for them to record their own thoughts. Examples might include products not being in stock, faulty goods, the customer not being able to find products, the customer being overcharged, a dirty store, unhelpful staff etc.

Take each customer problem in turn and explore possible solutions. Learners must consider both the customer and the retailer in their response: a solution should be found that satisfies both parties. Options could include offering an apology, offering compensation or offering a replacement product. It is important that learners are aware of the limitations of their own role when dealing with complaints and refer customers to a supervisor if necessary.

Discuss possible outcomes following a customer complaint or problem. Encourage learners to recognise that a satisfactory resolution can help to ensure repeat business, even if the customer was unhappy to begin with.

Activity 8: Customer complaints

In the activity, learners are presented with four customer scenarios. In each case, they must identify the problem and suggest an appropriate resolution. It is important they consider both the customer's needs and the retail business in their response; a solution must be found that is acceptable to both parties. Learners should also be careful not to suggest a solution they may not be authorised to provide, such as a refund. If they need to check their solution with a supervisor, they should indicate this in their response.

Learners can record their answers on the activity sheet or provide testimonial evidence of the approach they would take.

Resource sheet 9: What are your rights?

The purpose of this sheet is to make learners aware of the basic laws that affect customers in a retail environment and how consumer rights are protected. The mock receipt shown on the resource sheet contains certain legal information and can be used to initiate a discussion.

Introduce the resource sheet and ask learners to investigate the receipt. Have they considered that it is a form of contract between the retailer and the customer? Encourage them to consider why this might be the case and what rights the retailer and customer have that need to be protected during a transaction.

Build on the discussion to cover consumer protection laws. Ask learners to suggest other ways in which customer rights must be protected. If learners are not able to suggest particular pieces of legislation, take each law in turn and ask them how it would affect a customer in a retail environment; for example, health and safety laws are required to ensure good lighting, safe display shelves, level flooring, etc. Legislation governing the following areas should be drawn out in a discussion:

- Health and safety legislation – including COSHH.
- Fire regulations – including the importance of visible signage and trained staff should an evacuation be required.
- Data protection – notably the importance of protecting personal information supplied by customers. It is important that learners are aware of the circumstances in which personal data would be collected by the retailer; for example, credit checking, special orders, Internet orders, refunds, etc.
- Equal opportunities and disability discrimination – learners must recognise that all customers should be treated equally.

- The Trades Description Act – notably the importance of providing accurate information about products and services, and avoiding misleading claims.
- The rights of customers when returning goods.

Activity 9: Can you find the words?

This activity is made up of two parts. In the first part, learners are introduced to key words associated with consumer legislation in the word search provided on the activity sheet.

In the second part, learners must revisit the customer complaint scenarios introduced in Activity 8. This time, the focus is on the supporting legislation. In each instance, learners must identify which law is protecting the customer.



Extension activity

To build on the existing activity, learners can take the words from the word search, define them and, if applicable, suggest the law to which they relate. For example, data is information collected about a customer and is covered in the Data Protection Act.

The following words are given in the word search:

- COSHH
- health
- fire
- data
- opportunities
- discrimination
- trade
- protection
- sale

Useful resources

Resources include the following:

- Local retailers, who may be able to provide visiting speakers such as human resources managers to talk about personal presentation
- Local town/city centres, offering a range of different retail outlets
- Books such as:
 - Cox R, Brittain P: *Retailing – An Introduction*; FT Prentice Hall 2004, ISBN 0273678191

- Segel R: *Retail Business Kit for Dummies*; John Wiley & Sons 2001, ISBN 978-0764553813
- Dion J: *The Complete Idiot's Guide to Starting and Running a Retail Store*; Alpha Books 2008, ISBN 978-1592577262
- McManus S: *The Customer Service Pocketbook*; Management Pocket Books 2002, ISBN 1903-776007
- Trade journals such as:
 - *Convenience Store* (published by William Reed Business Media) – contains features on convenience stores
 - *Drapers* (published by Emap) – contains features on fashion retailers
 - *The Grocer* (published by William Reed Business Media) – contains features on grocers
 - *Retail Week* (published by Emap) – contains features on all types of retailers

Websites

- Video-sharing websites: search for 'We Assist Customer Service Program' – a short video on how a grocery store assists customers with special needs
- <http://customerservicezone.com/video> – the Customer Service Zone, including links to free customer service videos
- www.instituteofcustomerservice.com – the Institute of Customer Service, including reports and statistics on customer service
- www.skillsmartretail.com – the Sector Skills Council for Retail, including information relating to careers and statistics on employment, sales and the number of retail businesses
- <http://www.brc.org.uk> – the British Retail Consortium website containing up-to-date retail statistics
- www.oft.gov.uk – website for the Office of Fair Trading, with an explanation of consumer protection
- www.tradingstandards.gov.uk/ – website for Trading Standard containing information about consumer laws

Answers to activities

Activity 1: What should you do?

- 1 Learner's own answer. Ideas can include: meeting customer needs; meeting customer expectations; providing information to the customer; dealing with customer enquiries; providing services to the customer; being helpful, being polite; listening to what the customer wants.
- 2 Learner's own answer. Ideas can include: greet the customer politely; ask how you can help; listen carefully to what the customer wants;

answer the customer's questions; show the customer suitable products; discuss features and benefits of products with the customer.

Activity 2: How did Jack do?

1 Learner's own answer. An exemplar is given below:

Jack's manager is pleased because Jack is giving a good impression to customers. Jack is well-presented and this creates a good impression of the store. Jack is also providing a good example to other staff.

2 Learner's own answer. An exemplar is given below:

If Jack makes a good impression on customers, they will feel good about the store and trust what he says. These customers are more likely to be loyal to the store and tell their friends. This will mean more customers come to the store and it makes more money.

How customer service contributes to success:

- Customer:- needs and expectations are met
- Employee:- job satisfaction, good motivation, career progression
- Company:- satisfied customers return to the store to repurchase goods, satisfied customers tell other people for positive word of mouth, business and sales increase

Activity 3: Is this a good shop?

1 Learner's own answer. Ideas could include: cluttered display, overwhelming amount of stock on display, untidy displays (pile of cushions has fallen over, curtain display has become detached from wall, items have fallen over on the shelves), blocked walkways (fallen cushions are blocking access), narrow walkways, untidy till, incorrect sign (arrow indicating till is pointing in the wrong direction).

2 Learner's own answer. An exemplar is given below:

Decide what sells best, then clear away the slow-selling or dead stock. Use shelving units to display things better and to clear the floor to make space for pushchairs and wheelchairs. Position the items in their ranges but link related items such as duvets and duvet covers. Use colour schemes to help improve the look and feel. Clear the counter at the till point.

Activity 4: Can you help Sasha?

1 Learner's own answer. Suggestions may include: her name badge is crooked, her shirt is stained and untucked, her scarf is untidy, her jacket is unbuttoned, her tights are laddered, her shoelaces are untied.

2 Learner's own answer. Suggestions may include: ensure her uniform is clean and freshly-pressed; ensure her appearance is smart and well-presented – for example, her shirt is tucked in, her jacket is fastened,

her scarf is straight, her tights are not laddered, her shoes are clean and her laces are tied; ensure she stands up straight, takes her hands out of her pockets, makes eye contact and smiles.

3 Learner's own answer. An exemplar is given below:

Staff should:

- look alert and busy
- dress in a clean and tidy way
- make eye contact and smile
- greet every customer
- keep the store clean and tidy
- speak to other colleagues quietly and with respect
- always put the customer first
- acknowledge queuing customers when busy.

Activity 5: How can you help?

1 Learner's own answer. An exemplar is given below:

I will smile, make eye contact and greet Mr Elias. I will confirm exactly where he needs to get to on the second floor. I will explain the different options; for example, using the lift, using the escalator, providing a wheelchair, then let Mr Elias choose the option he prefers. I will escort him as far as I can. I could arrange for a personal shopper to assist if appropriate.

2 Learner's own answer. Suggestions may include: guiding customers to the correct department or location of products; advising whether products are in stock, advising on product benefits, advising on product price, advising on special offers or discounts; meeting the needs of customers with disabilities; assisting customers who are returning goods; assisting customers with enquiries about methods of payment.

Activity 6: Customer questions

- 1** Sign
- 2** Price label or Website
- 3** Website or Poster
- 4** Email
- 5** Letter
- 6** Learner's own answer. An exemplar is given below:

Written communication can help in many ways. It can:

- support the spoken word

- give customers information about specific things like discounts, alternative products, facilities, hazards
- tell them where to go.

Activity 7: Getting information

1 Learner's own answer. An exemplar is given below:

Mrs Williams will want me to be friendly. I will make eye contact and smile, stand upright when speaking, and speak clearly and not too loudly, to help explain things. These things will help Mrs Williams to get the information she needs and to receive a good impression of the staff and the store.

2 Learner's own answer. An exemplar is given below:

It is better to ask open questions first to get more information. The more information, the more likely I can help. For example: How can I help? What will her son use the laptop for? What is her budget? Then ask closed questions to confirm the details. For example: Is this one ok? Do you like this colour?

3 Learner's own answer. An exemplar is given below:

It is important to listen to Mrs Williams so that I understand her needs. I will repeat back what I hear so I can be sure I understand. It is important that Mrs Williams knows she is being treated as an individual.

Activity 8: Customer complaints

Learner responses will vary. Exemplar answers have been given below.

Mrs Williams brings the laptop back. It has a faulty hard drive.	Apologise, ask for proof of purchase, explain I can either exchange or refund. Refer to supervisor if necessary. Give back refund, apologise again and thank customer.
Ali can't get to the homewares department. There is no lift for his wheelchair.	Apologise and ask if there is something in particular Ali wanted to buy. Arrange to bring a selection of products to him if possible. If goods lifts are available, these can be used although Ali must be accompanied. If ramp is available, I can help him to access it.

<p>Laila bought a laptop. Two weeks later, someone from the store phoned to ask if she wanted antivirus software.</p>	<p>Apologise and try to get more detail of who contacted them. Explain that the incident can be reported if the customer wishes. Offer a store voucher with my manager's permission. Thank Laila for informing you.</p>
<p>Amelia slipped on a wet floor at the supermarket.</p>	<p>Stay calm and ask Amelia if she is ok. Assess whether she is hurt and seal off the area to give her privacy. Get help from a trained first aider. If necessary, arrange transportation to her home, the doctors or A&E depending on her injury. Make sure the customer has my name and details. Report the accident in the accident book. Follow up with a care call.</p>

Activity 9: Can you find the words?

n	j	n	y	p	n	g	c	t	p	r	k	d	o	n
s	p	h	e	a	l	t	h	p	m	r	k	c	p	d
a	n	s	k	d	a	t	a	v	p	q	s	r	p	i
l	f	b	s	e	q	f	f	l	t	y	b	k	o	s
e	f	g	o	o	d	s	i	x	c	u	n	o	r	c
l	y	r	r	m	j	b	r	h	z	s	a	q	t	r
x	g	r	q	k	i	v	e	w	b	u	x	l	u	i
e	c	j	h	w	x	w	i	w	n	a	i	w	n	m
c	o	s	h	h	c	q	v	u	q	l	s	w	i	i
d	l	h	l	e	d	m	y	b	y	d	e	i	t	n
k	b	f	t	r	a	d	e	s	g	j	b	t	i	a
j	k	q	m	a	l	g	q	x	z	n	a	h	e	t
u	l	p	r	o	t	e	c	t	i	o	n	m	s	i
y	y	l	z	w	o	d	f	z	e	l	f	o	p	o
m	z	y	x	p	k	x	a	r	o	x	q	b	s	n

Mrs Williams brings the laptop back. It has a faulty hard drive.	Sale of Goods Act – goods not of satisfactory quality
Ali can't get to the homewares department. There is no lift for his wheelchair.	Disability Discrimination Act
Laila bought a laptop. Two weeks later, someone from the store phoned to ask if she wanted antivirus software.	Data Protection Act
Amelia slipped on a wet floor at the supermarket.	Health and Safety at Work Act