

# Occupation Profile

## Providing Retail Services Modern Apprenticeship at SCQF Level 6

**Approved by:** Retail Technical Expert Group

**Approved date:** August 2023



**Purpose:**

This occupation profile consists of 24 work situations and NOS routinely carried out in customer service roles. This provides all the performance requirements and knowledge and understanding requirements apprentices need to demonstrate competence in the occupation.

## Meta-skills

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**Meta-skills sit alongside and complement technical knowledge, skills and behaviours. As technology, society and the way we work change at an ever-increasing pace, meta-skills are the over-arching and future-focused attributes that enable other skills to be developed through consideration, reflection and implementation.**

Meta-skills support improved performance and productivity, greater adaptability and resilience to change. For apprentices, meta-skills are a critical asset, supporting their ability to cope and excel in the face of change, to solve problems, to collaborate with others and to create successful futures. There are three categories, each with four meta-skills.

**Managing yourself** - focus, integrity, adaptability and initiative

**Connecting with others** - communication, feeling, collaboration and leadership

**Interacting with change** - curiosity, creativity, sense-making and critical thinking



### Developing meta-skills in Customer Service, Retail and Travel Apprenticeships

Supported by their employer, mentor and learning provider, apprentices should consider, practice and reflect on their use of meta-skills during their apprenticeship, building those skills to enhance their personal effectiveness in their present role and their future careers.

Here are some examples of when an apprentice might use Meta-skills:



#### Managing yourself

A clear **focus** is required when dealing with a complex problem relating to a customer booking; **integrity** is essential when providing honest and constructive feedback to colleagues; **adaptability** is key to dealing with changes and unexpected or challenging situations arising from customer complaints; and using **initiative** is critical to professional development when seeking to improve and gain new skills.



#### Connecting with others

Clear and effective **communication** with customers is one of the most significant aspects of roles across these apprenticeships; **feeling** and resilience is needed to show empathy and understanding when dealing with colleagues; skills in **collaboration** are vital to career development as working well as part of a team or business can help to improve individual and collective performance; and strong **leadership** qualities are required to give colleagues clear directions when working in a business environment.



#### Interacting with change

A keen sense of **curiosity** is a critical asset when asking questions about a new system or technique; **creativity** is fundamental to working with customers as it enables alternatives or solutions to be found; **sense-making** comes into play when helping a colleague to use a new or unfamiliar payment or information management system; and **critical thinking** is required to solve unexpected problems in the working environment.



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## Overview

This standard is part of the customer service competence area related to Impression and Image. It covers providing customer-centric service. It includes area that 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 to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You often deal with many customers who seem to be the same, but recognise that each customer is an individual. You make each customer feel that they have had your complete attention and have been dealt with personally to increase their sense of satisfaction. When your customer feels that you have taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience. Opportunities to add this extra value to your customer's experience depend on you spotting what they will particularly appreciate. Often you can offer this little extra when sorting out a difficulty or problem. Whatever special service you give when you "go the extra mile" must be within your own authority or with the authority of an senior colleague. You must also take account of the organisation's procedures and regulations. When you work with customers you make them feel that you care what happens to them and that you respect them as individuals.

This standard is for customer service professionals who provide customer centric service.

## Performance criteria

### *You must be able to:*

1. identify when you can add a personal touch to your customer service within your organisation's systems or procedures
2. observe and listen to your customers for signs that will help you personalise their service
3. confirm that you understand customer needs and are there to help them
4. identify opportunities to help or direct your customer outside of your routines and procedures
5. identify customers with individual needs who would appreciate a more personalised service
6. balance the time you take to give individual attention to one customer with the needs and expectations of other customers
7. communicate with customers following organisational guidelines to show respect for them as individuals
8. focus your attention on the customers you are dealing with
9. follow your organisation's guidelines for giving your customer your own name and contact details
10. build a 'one to one' relationship with your customer using organisational guidelines
11. treat customers as individuals recognising that each customer is unique
12. demonstrate respect to customers and colleagues at all times and avoid over-familiarity
13. explain your organisation's products and services
14. identify your customers' expectations and needs
15. match products and services with customers' expectations and needs
16. identify other actions that could give added value to your customer service and choose those that will impress your customers
17. check that added value actions fit within your organisation's guidelines and external regulations
18. explain your actions for added value service to a senior colleague for their authorisation when required
19. implement agreed actions to add value in customer service
20. communicate the added value of your actions with customers
21. monitor the effects of your added value actions to check that other customers are unaffected
22. monitor feedback from your customers about the impact of your actions
23. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the principles of customer centric service and the activities relating to it
2. when and how to use your customer's name, your name and contact details following organisational guidelines
3. the different personalities that customers have and their receptiveness to personalised services
4. the types of personal information about customers kept on record
5. the types and features of customer service you can offer to customers with individual needs
6. how to use open body language and approaches to communication that align with your organisation's culture, values and requirements
7. your organisation's guidelines on actions that are permissible outside of the normal routines and procedures
8. your own preferences and comfort levels relating to how you are willing and able to provide customer-centric service
9. the boundaries beyond which customer service may be perceived as inappropriate by your organisation
10. how to identify the unique requirements that individual customers have
11. the importance of adapting approaches to customer service delivery to show respect to customers and colleagues and the potential consequences of over-familiarity
12. how to gain information about a customer's preferences, including through social media
13. your organisation's services and products and how to match these to customer needs and expectations
14. how to evaluate customers' expectations of the service they will receive
15. that types of service actions that customers see as adding value to customer service
16. your organisation's rules and procedures that determine your authority to 'go the extra mile'
17. how your organisation receives customer service feedback about their customer experience
18. your organisation's procedures for making changes in its services and products
19. how to monitor feedback from customers and colleagues about actions taken to exceed customer expectations
20. how to recognise when added value actions become routine and should be accommodated within the standard services and products
21. the legal, organisational, codes of practice and policies relevant to

your role and the activities being carried out

Provide customer centric service

<b>Developed by</b>	Skills CFA
<b>Version Number</b>	1
<b>Date Approved</b>	22 Feb 2021
<b>Indicative Review Date</b>	01 Mar 2026
<b>Validity</b>	Current
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<b>Originating Organisation</b>	Instructus
<b>Original URN</b>	CFACSA8, CFACSA9
<b>Relevant Occupations</b>	Customer Service Occupations
<b>Suite</b>	Customer Service
<b>Keywords</b>	Communicating; giving respect; personal touch; customer service; communication; problem solving; behaviours; work with others; team working; balancing time; relationship building; feelings; adding value; appreciation



### Goal of work situation:

To monitor health, safety and security in line with legislative and organisation procedures to protect yourself and others from the risk of harm and injury.

### Brief outline:

This is about monitoring the health, safety and security of yourself and others who may be affected by your work. This involves co-operating with your employer to help them to comply with their duties under relevant health and safety legislation. It includes following set health and safety procedures and identifying and assessing unsafe situations in the workplace or during work activities. It also includes being aware of the main risks to health, safety and security in the workplace and suitable control measures or safe systems of work that can be put in place. In the event of incidents and emergencies required procedures must be followed.

Security could include land, buildings, equipment and machinery, stock, resources, personnel and information.

### Performance requirements

1. Monitoring that health, safety and security hazards are identified and risks assessed in your area of work in line with organisation procedures
2. Taking required actions in response to identified hazards and risks in line with organisation procedures
3. Checking that control measures put in place to eliminate or reduce risks in own area of work are adhered to in line with organisation procedures
4. Informing others in your work area of the risks and the control measures that have been put in place in line with organisation procedures
5. Monitoring that health and safety regulations, organisation procedures and safe systems of work are followed in own area of work
6. Checking that security is maintained in own area of work in line with organisation requirements
7. Checking that equipment and machinery is used, maintained and stored in accordance with relevant legislation, manufacturers' instructions and organisation requirements

### Knowledge and understanding requirements

1. Health and safety legislation and codes of practice, the legal responsibilities of employers and employees and the importance of monitoring these
2. The importance of following health and safety regulations, organisation procedures and safe systems of work
3. The difference between "hazard" and "risk", how to identify hazards and assess risks
4. The importance of regular risk assessment and what actions to take when risks are identified
5. Particular risks associated with your area of work including personal injury, contracting disease, and other physical and mental health problems
6. Effects that work-related accidents and ill health can have on workers and businesses and the importance of minimising these
7. The risks to others from the activities carried out in own area of work
8. How to communicate the findings of the risk assessment and health, safety and security measures to those at risk

8. Reporting and recording incidents and emergencies, including accidents and near misses, in accordance with legal and organisation requirements
9. Monitoring and reporting on the effectiveness of health, safety and security measures in line with organisation requirements
9. The hierarchy of measures to control risks including elimination, substitution, relevant controls, safe systems of work, training/instruction and PPE
10. The importance of good housekeeping in the workplace to maintaining health and safety
11. The importance of monitoring procedures to maintain security in own area of work
12. Key requirements of the regulations relating to the handling, use and storage of potentially hazardous substances
13. The safe methods of preparing, using, maintaining and storing equipment and machinery in accordance with relevant legislation, manufacturers' instructions and organisation requirements
14. Risks of injury associated with lifting and handling and how these can be minimised
15. The suitable clothing and personal protective equipment (PPE) required for work in your industry
16. The importance of regularly checking that PPE and emergency equipment is available and maintained
17. Risks of working in isolation, in remote locations and potentially dangerous situations, and the need to monitor that safe systems of work are followed, including communication and emergency procedures
18. The procedures to follow and actions to take in the event of incidents and emergencies including accidents and near misses
19. Where to obtain information, advice and support in relation to health, safety and security
20. Legislative and organisation requirements for recording and reporting incidents and emergencies, including accidents and near misses
21. Organisation requirements to monitor and report on the effectiveness of health, safety and security measures

### Goal of work situation:

To develop meta-skills and personal practice through self-evaluation, agreeing objectives, reflecting on practice, and actively learning to improve own performance in line with organisational requirements.

### Brief outline:

This is about developing meta-skills and personal practice. This involves reflecting on and learning from practice; acting on feedback; agreeing and working towards own objectives for continuous personal and professional development. Individuals will be supported in their development, usually by their line manager.

### Performance requirements

1. Identifying meta-skills and role specific skills regularly used in own work to assess strengths and improvement needs for personal and professional development
2. Discussing and agreeing SMART objectives for personal and professional development and to achieve business objectives
3. Discussing and agreeing appropriate development activities to improve own performance and to achieve business objectives
4. Completing development activities within agreed timescales to support and progress own performance
5. Acting on feedback to improve own performance and development
6. Reflecting on performance, meta-skills and specific skills developed in your role to identify and agree future development needs
7. Completing mandatory training in line with organisational requirements
8. Completing documentation required for personal and professional development in line with organisation policy and procedures

### Knowledge and understanding requirements

1. The purpose and importance of meta-skills including their definitions and how they relate to own work
2. The importance of personal and professional development within own organisation and role
3. How to use reflective practice to identify gaps in role specific knowledge, skills and meta-skills
4. How to participate effectively in performance reviews
5. How to discuss and agree SMART objectives – Specific, Measurable, Achievable, Realistic, Time-bound
6. The importance of business and personal objectives in own development
7. Sources of up-to-date and appropriate information to support own development
8. The importance of maintaining well-being in own role and where to get support
9. How to use feedback to develop own skills and knowledge
10. Different learning models and styles and how to use these for own development



## Optional work situations

A minimum of **seven** optional work situations/NOS must be achieved

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### Goal of work situation:

To allocate and check work of team members to meet organisational work plans.

### Brief outline:

This is about assigning and scheduling work to team members and checking on work progress and quality, both during and after completion, to ensure required standards of performance are being met and are in line with organisational policies, procedures and work plans.

Note: Team members refer to individuals working in your area over whom you have supervisory responsibilities.

### Performance requirements

1. Reviewing work plans for your area to identify work priorities and required outputs in line with organisational policies and procedures
2. Allocating tasks to team members in line with work plans and organisational policies and procedures
3. Providing clear instructions and guidance to team members to support completion of allocated tasks in line with work plans and organisational policies and procedures
4. Checking progress and quality of work by team members against work plans and quality standards
5. Providing team members with prompt feedback and guidance to maintain and improve performance
6. Providing team members with additional support where needed to enable work to be completed to deadlines and to required quality standards in line with organisational policies and procedures
7. Completing relevant documentation regarding allocating and checking work in line with organisational policies and procedures
8. Collecting and using information on work allocation and checks to support improvement of individual and team performance in line with organisational policies and procedures

### Knowledge and understanding requirements

1. Relevant employment regulations, organisational policies, procedures and contract terms and conditions that affect allocation of tasks to staff and work plans
2. How to check staff availability and working hours of team members to allocate tasks appropriately
3. Types and methods of effective communication and when and how to use these
4. How to provide prompt and constructive feedback and guidance to team members
5. Situations and examples where team members require additional support, methods to achieve this and how this can positively impact individual and team performance
6. Relevant methods for motivating team members in your area of responsibility
7. How to complete documentation and collect, record and use information about individual and team performance

## CFACSD5

### Buddy a colleague to develop their customer service skills



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#### Overview

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.

In customer service roles it is often useful to have a 'buddy' relationship with somebody who has more experience of the same customer service situation. If you are asked to buddy a colleague who is learning customer service aspects of their job, you need to approach that responsibility in an organised way. This Standard is about how to be a good buddy by working alongside your colleague and providing them with constructive feedback and support. You do not need to be more senior than your colleague or their supervisor to act as a customer service buddy.

# CFACSD5

## Buddy a colleague to develop their customer service skills

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### Performance criteria

#### Plan and prepare to buddy a colleague

*You must be able to:*

- P1 agree with your colleague aspects of their work which may benefit most from your buddying support
- P2 your understanding of your colleague's job tasks and responsibilities using reliable sources
- P3 clarify the customer service image and impression your colleague should present in their job
- P4 arrange times when it will be most helpful to work alongside your colleague
- P5 plan details of a buddy session to support your colleague on the job

#### Support your buddy colleague on the job

*You must be able to:*

- P6 agree with your colleague where you will be placed near them when buddying them on the job
- P7 ensure your presence when your buddy is dealing with customers does not detract from effective customer service
- P8 carry out customer service tasks in the presence of your buddy colleague to set an example they can follow
- P9 observe your colleague closely to identify what they do well and areas in which they could improve
- P10 discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement
- P11 praise your colleague on aspects of their work which they have carried out well
- P12 explain to your colleague ways in which they can improve their customer service performance
- P13 make notes on your colleague's strengths and areas for development that you can discuss with them

#### Provide buddy support off the job

*You must be able to:*

- P14 arrange suitable times to meet with your buddy colleague when they are not directly engaged with customers
- P15 identify areas of general interest that help to establish rapport with your buddy colleague
- P16 use notes made when observing your colleague to discuss positive and negative aspects of their performance
- P17 agree actions your buddy colleague can take to improve their customer service performance
- P18 offer hints and tips on effective customer service actions to your buddy colleague drawn from your own experience

## CFACSD5

### Buddy a colleague to develop their customer service skills

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#### Knowledge and understanding

*You need to know and understand:*

- K1 the tasks in your buddy colleague's job
- K2 areas of the job that benefit most from buddying support
- K3 the customer service image and impression that should be presented in your buddy colleague's job
- K4 the best times at which to work alongside your buddy colleague
- K5 ways to work alongside your buddy colleague without intruding on the customer relationship
- K6 techniques for giving positive feedback and constructive criticism to your buddy colleague
- K7 the importance of establishing an effective rapport with your buddy colleague
- K8 options for actions your buddy colleague can take to improve their customer service performance



## CFACSD5

Buddy a colleague to develop their customer service skills

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<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFACSD5
<b>Relevant occupations</b>	Customer Service Occupations
<b>Suite</b>	Customer Service (2013)
<b>Key words</b>	Buddying; colleagues; develop skills; relationships; learning; working together; constructive feedback; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information

## Overview

This standard is about coaching or mentoring employees, either in your own team or from another work group, to develop and maintain their performance. This standard also covers helping employees address problems affecting their performance. You understand the difference between mentoring and coaching. You help employees improve their performance by coaching them to identify their strengths and how they can use these most effectively. You support employees to analyse their performance and identify, develop, test and refine new skills and alternative behaviours as a coach. As a mentor, you provide information and advice to employees and facilitate their access to the resources they need to develop and progress.

This standard is for all managers and leaders.

## Performance criteria

### *You must be able to:*

1. help employees identify their needs and expectations for coaching or mentoring
2. ensure that employees' coaching or mentoring needs and expectations are in accordance with your organisation's objectives
3. define your own expectations of the coaching or mentoring process
4. agree coaching or mentoring contracts covering the specific area(s) for performance development, the gaps between current and required performance, and employees' motivations
5. outline the support that employees can expect from you, and the commitment you expect from them
6. provide opportunities for employees to approach you, as a mentor or a coach, with problems affecting their performance
7. identify performance issues and bring these to the attention of the employees concerned
8. identify obstacles to performance and support employees to overcome them
9. agree revisions to planned actions when required
10. maintain confidential records of your discussions with employees about problems affecting their performance
11. agree coaching or mentoring arrangements with employees including what you will provide, timescales, the location, frequency and duration of meetings
12. agree points when progress will be reviewed and how this will be measured and assessed
13. explore the skills employees need to develop and the behaviours for change to meet the desired standard of performance during coaching conversations
14. explore obstacles which could hinder employees' progress and how to remove these obstacles
15. plan with employees how they can develop new skills and behaviours in a logical step-by-step sequence
16. provide opportunities for employees to develop new skills and experiment with alternative behaviours
17. encourage employees to identify and seize opportunities to apply their newly developed skills and behaviours to their work
18. explore with employees any risks involved in applying their newly developed skills and behaviours to their work
19. plan how to reduce any risks to levels acceptable to employees and the organisation
20. identify and facilitate employees' access to the resources, information and advice they require for their development
21. provide advice to employees based on your own knowledge and experience during mentoring conversations

22. encourage and empower employees to take responsibility for developing and maintaining their own self-awareness, performance and impact
23. encourage employees to reflect on their progress and clarify their thoughts and feelings about it
24. monitor employees' progress in a systematic way, keeping records as required by your organisation
25. provide specific feedback designed to improve employees' skills, reinforce effective behaviours and enhance their motivation to achieve the desired standard of performance
26. agree with employees when they have achieved the desired standard of performance, or when they no longer require coaching or mentoring
27. follow the legal, organisational, codes of practice and policies relevant to coaching or mentoring employees

## Knowledge and understanding

*You need to know and understand:*

### **General knowledge and understanding**

1. the differences between coaching or mentoring and the features and benefits of each approach
2. the range of coaching or mentoring models, tools and techniques available, and how to select and apply these
3. the skills effective coaches and mentors require, and how to apply these skills
4. how to establish a formal and informal coaching contract with employees and what the contract should cover, including ethical considerations
5. the importance in giving employees opportunities to discuss problems affecting their performance
6. the importance of identifying performance issues and bringing these to the attention of the employees concerned
7. the importance of discussing performance with employees
8. the different communication approaches that can be used to raise and discuss individual performance with employees
9. the coaching or mentoring communication techniques used to help employees identify the skills they need to develop and the behaviours they need to change
10. the types of obstacles that could hinder employees' progress and how to remove them
11. how to help employees prepare a plan to develop their skills and adapt their behaviours

12. how to help employees try out new skills and behaviours in safe environments
13. the importance of helping employees identify and seize opportunities to apply their newly developed skills and behaviours in their work
14. how to help employees assess and manage risks associated with new skills and behaviours
15. the importance of monitoring employees' progress in developing new skills and behaviours and how to do this
16. how to give employees specific feedback designed to improve their skills, reinforce effective behaviours and enhance their motivation
17. how to establish a mentoring contract with employees and what the contract should cover
18. how to facilitate employees' access to the information, people and resources they require
19. the importance of employees reflecting on their progress and how to help them do this
20. the importance of recognising when employees have achieved their development objectives
21. how to empower employees to take responsibility for their own development

### **Industry and sector specific knowledge and understanding**

22. the legal, organisational, codes of practice and policies relevant to coaching or mentoring employees

### **Context specific knowledge and understanding**

23. the employees in your area of work, their roles, responsibilities, competences and potential
24. your organisation's objectives and culture for embedding coaching or mentoring practices through leadership and management
25. the types of coaching or mentoring contracts that your organisation requires
26. the documents and records that are used to support coaching or mentoring and how these are stored
27. the sources of information, resources and advice in your organisation that can support employees and you as a coach and mentor

## Skills

1. Coaching
2. Communicating
3. Demonstrating
4. Empathising
5. Empowering
6. Evaluating
7. Influencing
8. Information management
9. Inspiring
10. Leading by example
11. Learning
12. Monitoring
13. Motivating
14. Networking
15. Obtaining feedback
16. Planning
17. Presenting information
18. Problem solving
19. Providing feedback
20. Questioning
21. Reflecting
22. Reviewing
23. Thinking systematically
24. Valuing and supporting members of staff



## Coach or mentor employees

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<b>Developed by</b>	Skills CFA
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<b>Originating Organisation</b>	Instructus
<b>Original URN</b>	CFAM&LDC3, CFAM&LDC4
<b>Relevant Occupations</b>	Managers and Senior Officials
<b>Suite</b>	Management and Leadership
<b>Keywords</b>	Management & leadership; coach, mentor employees

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### Goal of work situation:

To support the development of individuals through identification of the skills, knowledge and competencies required to achieve objectives and goals, and supporting them to fulfil their potential.

### Brief outline:

This is about developing individuals to meet objectives and plans within your own area of responsibility. This involves establishing current levels of knowledge and skills and supporting the development of individuals to meet the planned requirements.

### Performance requirements

1. Identifying the knowledge, skills and competencies needed to deliver objectives and plans for own area of responsibility
2. Reviewing the existing capacity and capability within own area of responsibility to meet identified knowledge skills and competencies required
3. Identifying opportunities for individuals within own area of responsibility to develop their careers
4. Undertaking learning and development needs analysis for individuals to help them understand how they can develop within their roles
5. Supporting individuals to develop personal learning and development plans to identify their potential learning and development opportunities
6. Providing access to relevant opportunities for individuals to learn and develop within their roles
7. Monitoring and reviewing individual personal learning and development plans to identify any new learning and development opportunities

### Knowledge and understanding requirements

1. What knowledge, skills and competencies individuals need to deliver objectives and plans within own area of responsibility
2. Opportunities for individuals' career development in your area of responsibility
3. How to assess the current knowledge, skills and competencies of individuals and identify gaps and learning and development needs
4. How individuals' appraisals can be used to identify their learning and development needs
5. Sources of advice, guidance and support on learning and development
6. How to identify learning opportunities and how learning and development needs can be fulfilled
7. What the different learning styles are and how they affect learning
8. The importance of taking account of equality legislation, any relevant codes of practice and general diversity and inclusion issues in providing learning and development opportunities for individuals and how to do this
9. How to recognise obstacles to learning and development and provide support to overcome these
10. How to motivate individuals to take responsibility for their own learning and development
11. The principles of effective mentoring and coaching and how to apply these to support individuals with their learning and development
12. How to develop, monitor, review and amend learning and development plans
13. How to evaluate the success of learning and development interventions

## Overview

This standard is about delivering and evaluating customer service. The customers may be both internal and external to your organisation. It includes identifying customer needs and expectations, providing services to agreed timescales and quality standards and taking action to improve services based on customers' feedback.

It is for professionals in business administration roles who deliver and evaluate customer service.

## Performance criteria

*You must be able to:*

### **Identify customer needs and expectations**

1. build working relationships with internal and external customers
2. identify and confirm customer needs
3. agree timescales and quality standards with customers
4. manage expectations of all customers to make sure they are met

### **Deliver customer service**

5. provide services to agreed timescales and quality standards
6. follow the organisational procedures if agreed timescales are not achieved
7. check customer needs and expectations are met
8. follow the correct procedures to handle complaints in a professional manner and within set timescales

### **Monitor and evaluate customer services**

9. obtain and record customer feedback
10. analyse and evaluate customer feedback
11. take action to improve service to customers
12. follow the relevant legal and data protection legislation in relation to delivering customer service and information handling

## Knowledge and understanding

*You need to know and understand:*

1. the range of products and services offered by your organisation to internal and external customers
2. the principles of customer service
3. the purpose and benefits of delivering customer service that meets or exceeds and customer expectations
4. how to build working relationships with internal and external customers
5. how to manage and meet customer expectations
6. the types of quality standards appropriate to own responsibilities
7. how to meet timescales and quality standards with internal and external customers
8. how to monitor internal and external customers satisfaction
9. the types of problems that internal and external customers may experience and how to process and resolve or refer them
10. the relevant procedures to follow when handling complaints
11. the techniques for collecting and analysing internal and external customer feedback
12. the purpose and benefits of continuous improvement
13. the relevant legal and data protection legislation in relation to delivering customer service and information handling

Deliver and evaluate customer service

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**Skills**

1. evaluating
2. monitoring
3. problem solving
4. questioning
5. listening
6. negotiating

## Deliver and evaluate customer service

<b>Developed by</b>	Skills CFA
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<b>Original URN</b>	CFABAC121
<b>Relevant Occupations</b>	Administration Administration and Law, Administration and Secretarial Occupations, Business, Business and related associate professionals
<b>Suite</b>	Business and Administration
<b>Keywords</b>	Business; administration; customer service

## Demonstrate specialist products to customers in a retail organisation

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### Overview

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



## 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

## 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

PPL.C356



Demonstrate specialist products to customers in a retail organisation

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**Links to other NOS** PPL.C355 Help retail customers to choose specialist products in a retail organisation

Demonstrate specialist products to customers in a retail organisation

<b>Developed by</b>	People 1st
<b>Version Number</b>	2
<b>Date Approved</b>	March 2017
<b>Indicative Review Date</b>	March 2022
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	Skillsmart Retail
<b>Original URN</b>	SSR.C356
<b>Relevant Occupations</b>	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
<b>Suite</b>	Retail
<b>Keywords</b>	Retailing; retailers; demonstrates; demonstrating; demonstrations; items; goods; sells; selling; sales

### Goal of work situation:

To effectively evaluate promotional displays to ensure they are fit for purpose in line with organisational requirements.

### Brief outline:

This is about evaluating promotional displays to ensure they meet intended requirements and are safe and secure. This also covers escalating issues and making improvements within area of responsibility.

Promotional activities may include retail displays, window dressing and use of graphics and materials.

### Performance requirements

1. Obtaining information on promotional displays requiring evaluation in line with organisational policies and procedures
2. Preparing evaluation support materials in line with organisational policies and procedures
3. Checking promotional displays meet requirements of the display criteria in line with organisational policies and procedures
4. Assessing safety and security of promotional displays in line with legislative and regulatory requirements and organisational policies and procedures
5. Obtaining feedback from colleagues on promotional displays to identify areas for improvement in line with organisational policies and procedures
6. Escalating issues with promotional displays in line with organisational policies and procedures
7. Actioning authorised improvements to promotional displays in line with organisational policies and procedures
8. Recording evaluations, including any improvements and changes made to displays, in line with organisational policies and procedures

### Knowledge and understanding requirements

1. Organisational policies and procedures, and health, safety and security legislative and regulatory requirements for checking promotional displays and where this information can be found
2. Where to find organisational promotional display guidelines, support materials for checking and evaluating them and the importance of using them for branding, standardisation and improvement of future displays
3. How to assess safety and security of promotional activities
4. Importance of evaluating and improving promotional activities
5. Ways to engage colleagues to provide constructive feedback and why this is important
6. Who to escalate issues to in organisation and when this is required
7. Limits of own authority for resolving issues and making improvements
8. Organisational recording arrangements for evaluating promotional activities

Help retail customers to choose specialist products in a retail organisation

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## Overview

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

Help retail customers to choose specialist products in a retail organisation

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## 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

Help retail customers to choose specialist products in a retail organisation

## 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
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



PPL.C355

Help retail customers to choose specialist products in a retail organisation



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**Links to other NOS** PPL.C356 Demonstrate specialist products to customers in a retail organisation

Help retail customers to choose specialist products in a retail organisation

<b>Developed by</b>	People 1st
<b>Version Number</b>	2
<b>Date Approved</b>	March 2017
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<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	Skillsmart Retail
<b>Original URN</b>	SSR.C355
<b>Relevant Occupations</b>	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
<b>Suite</b>	Retail
<b>Keywords</b>	Retailing; retailers; helps; helping; assists; assisting; informs; informing; chooses; choosing; picks; picking; selects; selecting; choices; selections; advises; advising; advice; sells; selling; sales; information

## Leading meeting agenda items

### Goal of work situation:

To lead specific meeting agenda items in line with own role, responsibility and to meet organisational policies and procedures.

### Brief outline:

This is about leading on specific agenda items at team meetings. This involves attending meetings to lead on specific agenda items in line with managers expectations.

Note: Meetings may also be called briefings

### Performance requirements

1. Checking purpose and agenda of the meeting with organiser in line with organisational policies and procedures
2. Clarifying own objectives for team meetings with meeting organiser in line with organisational policies and procedures
3. Confirming how team meetings will be delivered in line with organiser and organisational policies and procedures
4. Preparing relevant information to support agenda input in line with role, responsibilities and meeting agendas
5. Communicating required information at team meetings in line with role and responsibilities and organisational requirements
6. Responding to queries, before or during meeting, raised in relation to agenda items to clarify understanding
7. Managing time during meetings in line with meeting schedules
8. Reflecting on input to team meetings to support own continuous improvement

### Knowledge and understanding requirements

1. Importance of understanding purpose, agenda and objectives of meetings
2. Importance of preparing own input to meetings and how to do this
3. Different ways in which meetings can be delivered, including face to face and digitally, and how to adapt communication styles
4. How to identify relevant information in advance of meetings
5. How to effectively manage agenda timings and the importance of this
6. How to encourage attendees to contribute and participate in meetings and the importance of this
7. Why it is important to reflect on your input to team meetings and how to do this

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## Overview

This Standard is about maintaining good environmental practice in day to day work activities. You are required to know the content of organisational policies and procedures, identify and report any actual or potential risks, minimise risks and use resources responsibly and know who the people are in your workplace to whom you should report environmental matters. You are also required to identify anything in your job role that could cause harm to the environment.

This Standard is for anyone who is involved in maintaining good environmental practice in day to day work activities.

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## Performance criteria

*You must be able to:*

1. seek information from reliable sources on organisational policies and procedures relating to environmental practice
2. remain up-to-date on environmentally-friendly working practices which are relevant to your workplace at all times
3. recycle and dispose of waste in line with organisational procedures
4. use information from reliable sources to identify current working practices and the use of materials, products or equipment which could cause harm to the environment
5. take appropriate action within the limits of your authority to adapt your working practice and use of materials, products or equipment to minimise environmental risk
6. use resources in line with environmental working practice
7. report any differences between legal regulations and workplace instructions and practice to appropriate people at appropriate times
8. report hazards which present high risks to appropriate people without delay

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## Knowledge and understanding

*You need to know and understand:*

1. your responsibilities for the environment as defined by legislation and workplace policies and procedures
2. the environmental monitoring requirements of the organisation that apply to your role
3. the particular risks to the environment which may be present in your workplace and/or in your own job role
4. the importance of remaining alert to the presence of hazards to the environment in the whole work place and promptly reporting, risks to the environment
5. the responsible people to whom to report environmental matters
6. organisational arrangements for recycling and disposal of waste
7. safe working practices and procedures for your own job role relating to the control of risks to the environment
8. correct handling instructions for materials which can be hazardous to the environment
9. how to identify misuse of materials, or products which are hazardous to the environment
10. communication methods and techniques
11. suppliers', manufacturers' and workplace instructions for the use of equipment, materials and products which can be hazardous to the environment

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<b>Developed by</b>	Creative & Cultural Skills
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<b>Version Number</b>	2
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<b>Date Approved</b>	March 2018
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<b>Indicative Review Date</b>	March 2021
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating Organisation</b>	Creative & Cultural Skills
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<b>Original URN</b>	CCSCV23
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<b>Relevant Occupations</b>	Cultural Venue Assistant
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<b>Suite</b>	Cultural Venue Operations
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<b>Keywords</b>	cultural; venue; operations; environment; environmental; risk
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## Overview

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



## Performance criteria

You must be able to:

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

## 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
14. what continuous improvement is and why it is important to contribute to the improvement process

## 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

Monitor and contribute to improving food safety in a retail organisation

<b>Developed by</b>	People 1st
<b>Version Number</b>	3
<b>Date Approved</b>	March 2017
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<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	Skillsmart Retail
<b>Original URN</b>	SSR.B308
<b>Relevant Occupations</b>	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Skilled Trades Occupations; Food Preparation Trades; Owner/Manager; Manager; Team Leader
<b>Suite</b>	Retail
<b>Keywords</b>	Retailing; retailers; monitors; monitoring; improves; improving; helps; helping; assists; assisting; meat; fish; produce; bakery; butchery

## Monitor and support secure use of the payment register and service area in a retail organisation

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### Overview

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

## Monitor and support secure use of the payment register and service area in a retail organisation

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### 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:
  - 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

## Monitor and support secure use of the payment register and service area in a retail organisation

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### 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



Monitor and support secure use of the payment register and service area in a retail organisation

<b>Developed by</b>	People 1st
<b>Version Number</b>	2
<b>Date Approved</b>	March 2017
<b>Indicative Review Date</b>	March 2022
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	Skillsmart Retail
<b>Original URN</b>	SSR.E211
<b>Relevant Occupations</b>	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Manager; Team Leader
<b>Suite</b>	Retail
<b>Keywords</b>	Retailing; retailers; monitors; monitoring; watches; watching; supports; supporting; ensures; ensuring; secures; securing; registers; checkouts; check outs; uses; using; working hours; opening hours

## Monitor the quality of customer service transactions

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### Overview

This standard is part of the customer service competence area related to Handling Problems, Queries and Complaints. It includes monitoring the quality of customer service transactions. It covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You monitor the quality of customer service transactions to improve the overall quality of your organisation's customer service. You measure quality and improvements of high volume of customer service transactions delivered face-to-face, by telephone or online by adopting a systematic sampling approach. This involves you assessing performance agreed criteria and performance ratings. You use spot checks and routine checks to observe colleague performance and analyse results to identify patterns and trends. You provide feedback to colleagues so that actions to improve individual performance can be taken.

This standard is for customer service professionals on supervisory or managerial levels who monitor the quality of customer service transactions and work with colleagues to improve their performance.

## Monitor the quality of customer service transactions

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### Performance criteria

*You must be able to:*

1. identify the criteria for monitoring the quality of customer service transactions
2. agree a sampling frame for monitoring customer service transactions
3. plan monitoring that complies with your organisation's guidelines for informing staff and customers that they are being monitored
4. identify rating scales for measuring the quality of customer service transactions
5. develop knowledge of the customer service procedures for transactions you are monitoring
6. carry out spot checks or observations of the quality of customer service transactions
7. carry out planned routine checks or observations of the quality of customer service transactions
8. observe or listen to a colleague dealing with a customer service transaction
9. record your observations of colleagues performance against agreed quality criteria
10. make judgements about quality of service delivery by allocating performance ratings on the rating scale
11. summarise your observations to identify patterns and trends in colleagues performance
12. provide feedback to colleagues that highlights the features of customer service where they met your organisation's requirements
13. give feedback to colleagues about aspects of their customer service delivery that they need to develop to meet your organisation's
14. propose action plans for coaching or training to improve colleagues customer service delivery when required
15. maintain records of customer service quality monitoring and action plans for improvements
16. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Monitor the quality of customer service transactions

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### Knowledge and understanding

*You need to know and understand:*

1. the agreed quality criteria for judging the quality of customer service delivery in your organisation
2. the methods used to construct a representative sample of customer service transactions for monitoring quality
3. the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service, and how they are informed
4. the ratings and scales that your organisation uses to judge customer service transactions
5. your organisation's procedures and guidelines for customer service transactions
6. how to record details of customer service transactions you have spot checked and observed to provide feedback
7. the advantages and disadvantages of routine and spot checks
8. how to listen or listen to a colleague dealing with a customer service transaction without disrupting or distracting them
9. how to complete monitoring records using your organisation's agreed quality criteria
10. how to allocate performance ratings for colleagues when judging the quality of their customer service
11. the techniques used to identify patterns and trends in customer service delivery when you are analysing and summarising your monitoring activities
12. how to provide feedback to colleagues that helps them to explore their performance against your organisation's requirements
13. the importance of providing feedback that highlights effective performance in addition to identifying areas for improvement
14. the sources of information about coaching and training options to improve customer service delivery and how to
15. the importance of keeping detailed records of service quality monitoring, coaching and training relating to colleagues' customer service delivery
16. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Monitor the quality of customer service transactions

<b>Developed by</b>	Skills CFA
<b>Version Number</b>	1
<b>Date Approved</b>	22 Feb 2021
<b>Indicative Review Date</b>	01 Mar 2026
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	Instructus
<b>Original URN</b>	CFACSD13
<b>Relevant Occupations</b>	Customer Service Occupations
<b>Suite</b>	Customer Service
<b>Keywords</b>	monitoring quality; customer service transactions; performance ratings; face- to-face; telephone monitoring; online; measure performance; patterns and trends; customer service; contact centres; developing; improving;

## Overview

This standard is about ordering stock in line with established purchasing agreements. It details several ordering methods, such as electronically, as well as the type of information that is consistently required during the ordering process.

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

\* Order stock

## Performance criteria

*You must be able to:*

1. Check stock levels on a regular basis and consult with colleagues to determine if new stock is required
2. Identify stock requirements, ensuring sufficient storage space will be available upon arrival
3. Obtain relevant documentation for ordering stock and where required obtain permission from the proper person to place an order
4. Complete required information on documentation and use the correct method of ordering within the time required to ensure delivery before current stock is finished
5. Maintain documentation in line with organisational requirements
6. Obtain and file notification of placed orders and notification from supplier
7. Respond to queries and solve problems that arise about the order within your authority

## Knowledge and understanding

*You need to know and understand:*

1. What the ordering process is in own area of responsibility
2. When you should order new stock in line with organisational requirements
3. Who is responsible for arranging the central purchasing agreement
4. What the central purchasing agreement contains
5. Why and who to contact when problems occur with the ordering process
6. When ordering needs to be approved by a line manager
7. Where to obtain the ordering documentation from
8. What information needs to be entered on the documentation
9. Where ordering documentation is kept



## Scope/range

1. Stock requirements
  - 1.1 product type
  - 1.2 product brand
  - 1.3 amount
  
2. Required information
  - 2.1 quantity
  - 2.2 product type
  - 2.3 date for required delivery
  - 2.4 contact details
  
3. Method of ordering
  - 3.1 electronic
  - 3.2 in person
  - 3.3 telephone
  
4. Problems
  - 4.1 quantity
  - 4.2 time
  - 4.3 non-delivery
  - 4.4 availability
  - 4.5 type
  - 4.6 quality

## Glossary

Ordering documentation may be paper based or electronic depending on the process and system used by the organisation

## Order stock

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<b>Developed by</b>	People 1st
<b>Version Number</b>	3
<b>Date Approved</b>	01 Mar 2022
<b>Indicative Review Date</b>	28 Feb 2027
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	People 1st International Ltd
<b>Original URN</b>	PPL2GEN2
<b>Relevant Occupations</b>	Bar Staff, Chef, Cook, Kitchen Assistant, Team Member
<b>Suite</b>	Hospitality - Generics
<b>Keywords</b>	order stock, purchasing, ordering, delivery, stock, ordering, supplier

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## Plan marketing activities for a retail organisation

**Overview**

Word-of-mouth and an eye-catching shop front are both important ways of attracting business, but this might not be enough by themselves. If that is so, retail organisations will need to plan some marketing activities. Use of technology and social media platforms can be used to research and improve marketing plans and activities.

This standard is for owners, managers, market research personnel, buyers, merchandisers and senior sales staff.

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

- Plan marketing activities for a retail organisation

## Plan marketing activities for a retail organisation

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### Performance criteria

You must be able to:

1. develop specific marketing objectives that will support the brand and help achieve goals for planning how to market your retail organisation
2. research different marketing methods to find out what can be expected of a marketing plan to be successful
3. calculate the costs and benefits of marketing in enough detail to enable a choice of cost-effective and affordable marketing methods
4. check that proposed marketing activities will meet relevant legal and organisational requirements
5. monitor marketing trends and competitors' marketing activity and adjust marketing plans as required so that your retail organisation stands out from the competition
6. take into account forecasts for demand for goods or services, to ensure that a plan for marketing activities are directed to where they will be successful
7. review the success of specific marketing activities and use this information to inform future marketing plans

## Plan marketing activities for a retail organisation

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### Knowledge and understanding

You need to know and understand:

1. how to develop marketing objectives that will support your retail organisation's objectives
2. the ways of researching different marketing methods to identify which method could achieve the most for your retail organisation within the required timescales
3. how to calculate and compare the costs and likely benefits of different marketing methods
4. how to check what the relevant legal requirements and retail organisation requirements are regarding marketing activities and that the proposed marketing activities will meet those requirements
5. the methods that can be used to regularly monitor marketing trends and competitors' marketing activity and adjust the marketing plan/s appropriately
6. the factors that differentiate one retail organisation from another from the customer's point of view, and how to highlight these in marketing your retail organisation
7. how to target marketing activities to improve sales
8. what criteria to use when evaluating the success of specific marketing activities

## Plan marketing activities for a retail organisation

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<b>Status</b>	Original
<b>Originating Organisation</b>	Skillsmart Retail
<b>Original URN</b>	SSR.A004
<b>Relevant Occupations</b>	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Buyers and procurement officers; Sales and Customer Services Occupations; Sales and Related Associate Professionals; Sales Related Occupations; Sales Representatives
<b>Suite</b>	Independent retailers
<b>Keywords</b>	Retailing; retailers; SMEs; small-medium enterprises; small medium enterprises; small enterprises; medium enterprises; independents; plans; planning; markets; marketing

### Goal of work situation:

To process part-exchange transactions in line with organisational policies and procedures and legislative and regulatory requirements.

### Brief outline:

This is about processing part-exchange transactions in your organisation. This includes explaining the part-exchange process to customers, inspecting items presented, calculating values and supporting customer with their part-exchange purchase.

### Performance requirements

1. Explaining to customers the part-exchange process and terms and conditions in line with organisational policies and procedures and relevant legislative and regulatory requirements
2. Conducting any ownership checks required in line with organisational policies and procedures and relevant legislative and regulatory requirements
3. Inspecting part-exchange items thoroughly and carefully in line with organisational policies and procedures
4. Identifying and recording any repairs and cleaning required in line with organisational policies and procedures
5. Costing any required repairs and cleaning in line with organisational policies and procedures
6. Calculating the exchange value of items in line with organisational policies and procedures
7. Explaining the calculated exchange value of items to customers in line with organisational policies and procedures
8. Clarifying acceptable items to be purchased as part of part-exchange transactions in line with organisational policies and procedures
9. Calculating payment balance of items to be purchased as part of part-exchange transactions in line with organisational policies and procedures
10. Processing payment transactions in line with organisational policies and procedures
11. Recording and storing details of part-exchange transactions in line with legislative and regulatory requirements and organisational policies and procedures

### Knowledge and understanding requirements

1. Organisational policies and procedures and relevant legislative and regulatory requirements about part-exchange transactions
2. Why and when ownership checks are required and how to do this
3. Type and quality of items that can be accepted in part-exchange transactions and how to inspect these
4. How to identify repairs and cleaning requirements and where to record these
5. Organisational policies and procedures for costing any required repairs and cleaning and where to record these
6. Organisational policies and procedures for calculating final exchange value of items and where to record these
7. How to communicate and explain organisational part-exchange process and final exchange value
8. Types of items which can and can't be purchased as part of part-exchange transactions
9. Organisational policies and procedures for calculating payment balances for part-exchange transactions and how to do this
10. How to process payment transactions in your organisation
11. How to record and store details of part-exchange transactions



### Goal of work situation:

To accurately process customer returns, refunds and exchanges to meet relevant legislative and regulatory requirements according to organisational procedures.

### Brief outline:

This is about complying with relevant legislative and regulatory requirements and organisational procedures when processing customer returns, refunds and exchanges of goods or services. This includes checking products and services requiring refunds and exchanges, and accurately completing transactions and recording all relevant information.

Note: Customer also refers to visitor, guest and clients.

### Performance requirements

1. Checking type, quantity and condition of items presented for returns, refunds and exchanges in line with organisational policies and procedures.
2. Explaining clearly to customers relevant organisational policies and procedures for returns, refunds and exchanges
3. Dealing effectively with customer complaints and feedback relating to returns, refunds and exchanges in line with organisational policies and procedures
4. Using correct systems to process returns, refunds and exchanges in line with organisational policies and procedures
5. Providing relevant documentation to customers associated with their returns, refunds and exchanges
6. Checking all retained documentation for returns, refunds and exchanges is completed and stored in line with relevant legislative and regulatory requirements and organisational policies and procedures
7. Updating records relating to stock, customer feedback and information in line with relevant legislative and regulatory requirements and organisational policies and procedures
8. Arranging for returned and exchanged items to be sent to relevant areas, departments, suppliers and manufacturers in line with organisational policies and procedures

### Knowledge and understanding requirements

1. Organisational policies and procedures, relevant legislative requirements and codes of conduct relevant to customer returns, refunds and exchanges
2. Responsibilities of own role relating to processing returns, refunds and exchanges
3. How to check quantity and condition of items being returned, refunded and exchanged
4. Methods for communicating information about returns, refunds and exchanges to customers in line with organisational policies and procedures
5. How to constructively manage customer comments and feedback and communicate these to colleagues and other departments
6. Correct organisational procedures and systems used for processing returns, refunds and exchanges
7. How to complete relevant documentation for customers during and after processing returns, refunds and exchanges
8. What documentation is retained and where and how to store this
9. Records required for stock control, customer and supplier feedback and information and how to update these
10. How and where to send returned and exchanged items

## Receiving stock

### Goal of work situation:

To receive stock to meet organisational policies and procedures.

### Brief outline:

This is about receiving stock in line with relevant organisational procedures. This involves, moving stock and completing stock records, including recording loss and theft.

### Performance requirements

1. Checking relevant stock areas to ensure they are clean, clear and secured against unauthorised access in line with organisational policies and procedures
2. Checking stock documentation to confirm stock level requirements
3. Reporting stock discrepancies to appropriate personnel in line with organisational policies and procedures
4. Checking stock conditions meets organisational quality requirements
5. Transporting stock in line with organisational safety procedures to prevent causing damage to stock during transportation
6. Recording details of stock received, including discrepancies, in line with organisational policies and procedures
7. Handling and disposing of waste in line with relevant legislative requirements and organisational procedures

### Knowledge and understanding requirements

1. Health, safety and environmental regulations, safe and hygienic working practices and organisational policies and procedures when receiving stock
2. Types of stock items used in the organisation and their storage requirements
3. Why storage areas should be secured from unauthorised access and the importance of this
4. Processes for reporting stock discrepancies and how to do this
5. Quality indicators to look for when dealing with stock
6. Quality and quantity stock issues that may occur during the receipt of stock and how to deal with these
7. Different methods used to safely transport stock using manual and mechanical means
8. How to complete accurate stock records and where to store them
9. Types of waste within your remit and organisational procedures and relevant legislative requirements for handling and disposing of waste
10. The importance of environmental good practice and sustainability and how to apply this in your area of responsibility

### Goal of work situation:

To sell products and services to meet customers' needs and requirements, and organisational sales plans and objectives.

### Brief outline:

This is about selling products and services through identifying customers' needs, promoting features and benefits of relevant products and services and identifying opportunities for maximising sales. This also includes effectively closing sales.

### Performance requirements

1. Identifying and offering products and services to meet customers' needs in line with organisational policies and procedures
2. Explaining features of products and services to support customers' decisions on whether to purchase
3. Sharing options and information with customers to help them to explore products and services further
4. Identifying additional opportunities to maximise customer sales in line with organisational policies and procedures
5. Providing customers with responses to queries in line with organisational policies and procedures
6. Communicating important sales related information to customers, including any mandatory statements, in line with organisational policies and procedures
7. Detailing payment options for final sale in line with regulatory requirements and organisational policies and procedures
8. Closing sales effectively in line with organisational policies and procedures
9. Recording, storing and processing customer and sales information in line with current regulatory and data protection requirements, and organisational policies and procedures

### Knowledge and understanding requirements

1. Relevant regulatory and data protection requirements, and organisational policies and procedures relating to selling products and services to customers
2. Features and benefits of organisational products and services including how to promote these to meet different customers' needs and requirements
3. Organisational sales plans and objectives and your role and remit in relation to this
4. Effective questioning and listening techniques and how to use them to identify customers' needs and requirements
5. Opportunities for selling additional products and services to maximise sales, and how to do this
6. How to identify and adapt to customer's needs and requirements
7. Differences between communication methods (face to face, email, phone), when to use them and how to adapt your approach depending on method selected
8. Communication techniques and how to use them to communicate with customers
9. Methods and techniques for closing sales and how to apply them
10. Relevant regulatory and legislative requirements, and organisational policies and procedures governing recording, storing and processing customer information and any associated mandatory statements
11. Types of unexpected situations and problems that can occur when selling products and services, and correct methods for dealing with them

## Support effective team working in a retail organisation

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### Overview

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

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

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

- Support effective team working in a retail organisation

## Support effective team working in a retail organisation

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### Performance criteria

You must be able to:

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

Support effective team working in a retail organisation

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**Knowledge and understanding**

You need to know and understand:

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

## Glossary

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

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

## Links to other NOS

PPL.E336 Contribute to the planning, organisation and evaluation of your own learning in a retail organisation

PPL.E337 Help colleagues to learn in a retail organisation

## Support effective team working in a retail organisation

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<b>Relevant Occupations</b>	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Sales Related Occupations; Owner/Manager; Manager; Team Leader
<b>Suite</b>	Retail; Retail Buying; Retail Merchandising
<b>Keywords</b>	Retailing; retailers; supports; supporting; encourages; encouraging; efficient; efficiency; effectively; teamwork; team work; buyers; buys; buying; merchandisers; merchandises; merchandising



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

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### Overview

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

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

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### 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

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

**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
9. the impact of relevant legislation and regulatory requirements upon the selling of products within your area of responsibility

Use in-store online facilities to achieve retail sales

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<b>Originating Organisation</b>	People 1st
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<b>Relevant Occupations</b>	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales and Related Associate Professionals; Sales Assistants and Retail Cashiers
<b>Suite</b>	Multi-channel Retailing
<b>Keywords</b>	online; on-line; customer; web; internet; web-based retail; multi-channel