



SPECIFICATION

IAO Level 3 Diploma in Retail Skills (Management) (QCF)

Qualification summary

QCF level	3
Qualification credit value	43 credits
Minimum credits at/above level	43 credits
Assessment requirements	<p>Portfolio of Evidence</p> <p>This qualification is internally assessed and internally quality assured by Centre staff and externally quality assured by Innovate Awarding External Quality Advisors (EQAs).</p>
Aims and objectives of the qualification	<p>The IAO Level 3 Diploma in Retail Skills (Management) (QCF) is a flexible qualification designed to provide Learners with an in-depth level of retail competence required by employers in the sector.</p>
Entry guidance	<p>There are no formal entry requirements for this qualification.</p> <p>This qualification is suitable for those who work within the Retail sector. It is typically suitable for those with retail managerial responsibilities and autonomy.</p>
Progression opportunities	<p>Learners who achieve this qualification can progress within employment, or can progress to the</p> <ul style="list-style-type: none"> IAO Level 3 Certificate in Retail Knowledge (QCF) IAO Level 3 Diploma in Retail Skills (Visual Merchandising) (QCF) IAO Level 3 Diploma in Retail Skills (Sales Professional) (QCF) IAO Level 3 NVQ Certificate in Management (QCF)

Qualification structure

To complete this qualification, candidates must achieve a minimum of 43 credits.

All 43 credits must be achieved at level 3, of which 10 credits must come from the mandatory unit in Group A. 33 credits must come from Groups B.

A minimum of 18 credits must come from Group B1. A maximum of 15 credits can come from Group B2. A maximum of 8 credits can come from Group B3.

Unit Structures

All units are listed below

Mandatory units

Qualification Structure

Mandatory Group A

Unit Reference	Title	Level	Credit value	GLH
H/503/5729	Work effectively and support others in a retail organisation	3	10	50

Optional Group B1

Unit Reference	Title	Level	Credit value	GLH
A/503/5669	Audit stock levels and stock inventories in a retail environment	3	6	28
T/503/5671	Source required goods and services in a retail environment	3	10	52
L/503/5675	Monitor and help improve food safety in a retail environment	3	11	50
D/503/5681	Manage staff to receive goods in a retail environment	3	5	24
H/503/5682	Organise and monitor the storage of stock in a retail environment	3	6	27
L/503/5692	Maintain the availability of goods on display in a retail environment to promote sales	3	6	30
R/503/5693	Manage the payment transaction process in a retail environment	3	9	43

Unit Reference	Title	Level	Credit value	GLH
D/503/5731	Contribute to the continuous improvement of retail operations within own area of responsibility	3	10	47
H/503/5732	Manage the prevention of wastage and loss in a retail environment	3	11	50
K/503/5733	Produce staffing schedules to help a retail team to achieve its targets	3	5	22
M/503/5734	Monitor and maintain health and safety in a retail environment	3	13	60
F/503/5737	Monitor and support secure payment point use during trading	3	3	13

Optional Group B2

Unit Reference	Title	Level	Credit	GLH
M/600/9600	Set objectives and provide support for team members	3	5	35
Y/600/9669	Plan, allocate and monitor work of a team	3	5	25
F/600/9715	Make effective decisions	3	3	10
R/600/9685	Manage conflict in a team	3	3	20
M/600/9628	Manage or support equality of opportunity, diversity and inclusion in own area of responsibility	3	4	20

Optional Group B3

Unit Reference	Title	Level	Credit	GLH
Y/601/1230	Organise the delivery of reliable customer service	3	6	40
H/601/1232	Improve the customer relationship	3	7	47
D/601/1553	Work with others to improve customer service	3	8	53

Unit Reference	Title	Level	Credit	GLH
J/601/1515	Monitor and solve customer service problems	3	6	40
H/601/1554	Promote continuous improvement	3	7	47

Title:	H/503/5729 Work effectively and support others in a retail organisation
Level:	3
Credit value:	10
GLH:	50
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how own team contributes to the success of the wider organisation	<p>1.1 Explain own team's purpose, aims and targets in the context of the wider organisation</p> <p>1.2 Explain the roles and responsibilities of colleagues in own team</p> <p>1.3 Explain the importance of good working relations within own team</p>
2. Understand own role within a team in a retail environment	<p>2.1 Explain own responsibility for contributing to own team's success, including helping colleagues to learn</p> <p>2.2 Explain the importance of being a reliable team member</p> <p>2.3 Explain the factors to take account of when making commitments, including: existing workload the degree to which interruptions and changes of plan are within own control</p> <p>2.4 Explain the importance of implementing the organisation's policies and procedures for health and safety, including the importance of setting a good example to colleagues</p>
3. Understand what motivates self and colleagues in a retail environment	<p>3.1 Explain the factors that can affect own and colleagues' motivation to carry out work in a retail environment, including skills and existing workload</p> <p>3.2 Explain potential circumstances that could affect morale in a retail environment</p>

<p>4. Be able to support effective working within a retail team</p>	<p>4.1 Allocate work in ways that take account of own and colleagues' preferences, skills and available time</p> <p>4.2 Make and keep commitments to colleagues within: own team the wider organisation</p> <p>4.3 Agree alternative actions when it is not possible to keep commitments made to colleagues</p> <p>4.4 Interact with colleagues within own team and wider organisation in ways that attempt to maintain morale</p> <p>4.5 Explain to team members why it is important to treat each other fairly, politely and with respect</p> <p>4.6 Implement own organisation's health and safety procedures while working</p>
<p>5. Be able to improve own work performance in own retail team</p>	<p>5.1 Identify knowledge and skills needed to improve own work performance</p> <p>5.2 Reach agreement with own line manager concerning: learning and development goals action points and deadlines for own learning and development</p> <p>5.3 Take measures to improve own performance</p> <p>5.4 Review own progress against an agreed learning and development plan, including seeking feedback from those in a position to give it</p>
<p>6. Be able to help others to learn in a retail environment</p>	<p>6.1 Communicate to colleagues own willingness and availability to provide work-related information and advice</p> <p>6.2 Provide information and advice on request to colleagues where this is within own responsibility</p> <p>6.3 Provide advice and support to colleagues to help them meet the organisation's standards</p> <p>6.4 Communicate procedures to colleagues in a logical sequence to help them meet the organisation's standards</p> <p>6.5 Provide colleagues with opportunities to practise new skills</p>

	<p>6.6 Provide constructive feedback to colleagues on their progress in developing new skills</p> <p>6.7 Ensure that health, safety and security are not compromised when helping others to learn</p> <p>6.8 Refer colleagues to specialist advice as needed to support their learning</p>
<p>Additional information about this unit</p> <p>N/A</p>	
Unit aim (s)	<p>This unit assesses the occupational competence of a team leader or senior team leader within a retail team, to work effectively and support others to contribute to the success of the wider organisation.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>This unit requires workplace assessment of occupational competence.</p> <p>Simulation is not allowed for any performance evidence within this unit.</p> <p>This unit can be assessed independently of other units. However, it may be possible to generate some of the evidence for this unit holistically when gathering evidence for other units in the same qualification.</p> <p>AC 4.5: ‘Politely’ means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.</p> <p>AC 6.6: ‘Constructive’ means objective (i.e. not personal), designed to help, and conveyed in a respectful manner.</p> <p>Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)</p>
Details of the relationship of the unit and relevant national occupational standards	<p>N/A</p>

Title:	A/503/5669 Audit stock levels and stock inventories in a retail environment
Level:	3
Credit value:	6
GLH:	28
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to implement a stock audit in a retail environment	<p>1.1 Explain the importance of auditing levels of stock and stock inventories</p> <p>1.2 Plan an audit of stock that: will ensure accurate, complete and timely auditing will cause as little disruption as possible to normal work includes plans for dealing with contingencies</p> <p>1.3 Negotiate with colleagues to obtain staff who have the necessary skills to help with the audit</p> <p>1.4 Allocate specific responsibilities to each member of the audit team</p> <p>1.5 Explain to the audit team what they are expected to do</p> <p>1.6 Diagnose and resolve problems that arise when implementing the audit</p>
2. Be able to use the findings of an audit to identify and resolve problems with stock levels and stock inventories	<p>2.1 Analyse the findings of a stock audit to identify problems that need resolving</p> <p>2.2 Prioritise problems according to their importance and urgency</p> <p>2.3 Investigate and resolve problems: methodically as far as possible within the scope of the audit and with the resources available</p>
3. Be able to communicate the results of an audit	<p>3.1 Clarify audit findings, including any unresolved problems, in a timely fashion for those who need the information</p>

Additional information about this unit	
N/A	
Unit aim (s)	This unit assesses the occupational competence of individuals who are responsible for organising and implementing stock audits. The audit team may consist of people who do not normally work together, and the learner need not necessarily be a team leader in their day-to-day work.
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>This unit requires workplace assessment of occupational competence.</p> <p>Simulation is not allowed for any performance evidence within this unit.</p> <p>Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)</p>
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	T/503/5671 Source required goods and services in a retail environment
Level:	3
Credit value:	10
GLH:	52
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the role of suppliers when sourcing goods and services	<p>1.1 Explain how suppliers' terms and conditions can affect the profitability of a retail business</p> <p>1.2 Explain the organisation's legal rights as a purchaser of goods and services, including rights relating to returns, replacements and refunds</p> <p>1.3 Explain what constitutes a legally binding contract between retailer and supplier</p>
2. Be able to source required goods and services	<p>2.1 Interpret stock records to establish: which stock needs replenishing the quantity of stock required</p> <p>2.2 Evaluate the service offered by suppliers, taking account of: the availability of the required goods and services the terms and conditions offered by suppliers</p>
3. Be able to order goods and services	<p>3.1 Analyse purchase requisitions to identify items that can be ordered together</p> <p>3.2 Order goods and services: of the required type and quantity allowing sufficient time for delivery</p> <p>3.3 Develop procedures that will enable colleagues to give sufficient notice of any special orders for goods and services</p> <p>3.4 Resolve overdue or incomplete orders with the supplier</p> <p>3.5 Arrange returns, replacements and refunds when applicable</p> <p>3.6 Explain the options available when orders cannot be fulfilled on time</p>

	3.7 Maintain purchasing records that are in line with organisational procedures
4. Be able to evaluate the performance of suppliers of stock for retail sale	<p>4.1 Evaluate the quality, price and timeliness of deliveries against the organisation's requirements</p> <p>4.2 Evaluate colleagues' feedback about suppliers' performance to determine if the standard of performance is acceptable</p> <p>4.3 Provide feedback to suppliers on the level of service they provide</p>
Additional information about this unit	
N/A	
Unit aim (s)	This unit assesses the occupational competence of someone who orders stock for a retail store and is responsible for choosing the store's suppliers as well as ordering stock directly from suppliers.
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>This unit requires workplace assessment of occupational competence.</p> <p>Simulation is not allowed for any performance evidence within this unit.</p> <p>Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)</p>
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	L/503/5675 Monitor and help improve food safety in a retail environment
Level:	3
Credit value:	11
GLH:	50
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the principles of food safety management that apply to a retail environment	<p>1.1 Explain the following terms in relation to own organisation: 'critical control points' 'control points' 'critical limits' 'variance'</p> <p>1.2 Explain the importance of monitoring critical control points and control points</p> <p>1.3 Explain the impact of variance at critical control points and control points on food safety, public health and the organisation</p> <p>1.4 Explain why traceability is important to food safety</p> <p>1.5 Explain how traceability works</p> <p>1.6 Explain the importance of having organisational food safety procedures in place</p>
2. Be able to monitor critical control points in a retail environment	<p>2.1 Select relevant food safety control measures when monitoring critical control points</p> <p>2.2 Implement all specified organisational operational controls and checks of critical control points at the set time frequency</p> <p>2.3 Maintain records of monitoring activities in line with organisational procedures</p> <p>2.4 Obtain verification for completed checks, following organisational procedures</p>

<p>3. Be able to deal with problems identified when monitoring critical control points in a retail environment</p>	<p>3.1 Take corrective action when control measures fail, ensuring that such action is: suited to the situation carried out with a degree of urgency that matches the seriousness of the situation</p> <p>3.2 Report to the designated person any procedures that are out of line with critical limits</p> <p>3.3 Seek expert advice and support for problems identified when monitoring critical control points that are outside own level of authority or expertise to resolve</p>
<p>4. Be able to ensure that staff perform to the standard required for food safety in a retail environment</p>	<p>4.1 Allocate food safety responsibilities to staff</p> <p>4.2 Supervise staff to ensure that allocated food safety responsibilities are met</p> <p>4.3 Ensure that staff receive the training in food safety that they need</p>
<p>5. Be able to evaluate the nature and impact of factors or issues that may affect the safety of food in a retail environment</p>	<p>5.1 Evaluate the nature and impact of factors or issues that may affect the safety of food, arising in: own work activities the working environment supplies products to be sold to customers</p>
<p>6. Be able to contribute to improving food safety in a retail environment</p>	<p>6.1 Explain the term 'continuous improvement' in relation to food safety</p> <p>6.2 Explain the importance of contributing to the process of improving food safety</p> <p>6.3 Present to decision-makers ideas for improving procedures or processes that affect food safety</p> <p>6.4 Implement new or revised procedures to improve food safety, where authorised to do so</p>
<p>Additional information about this unit</p> <p>Glossary</p> <p>Control measures</p> <p>Actions required to prevent or eliminate a food safety hazard or reduce it to an acceptable level.</p> <p>Control point</p>	

A step in the food preparation process which can be controlled, but would not result in an unacceptable health risk if control was not exercised.

Corrective action

The action to be taken when a critical limit is breached.

Critical control point

A step in the food control or preparation process where a food safety hazard must be dealt with by preventing it, removing it or reducing it to an acceptable level.

Critical limit

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

Food safety hazards

Something which may cause harm to the consumer and can be:

- microbiological (for example, bacteria, moulds, viruses)
- chemical (for example, pesticides used on fruit and vegetables, chemicals used in cleaning or for pest control)
- physical (for example, insects, parasites, glass, nails)
- allergenic (for example, 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 companies document their procedures formally in writing, and others simply have procedures that all staff understand and follow but which are not written down.

Training

Bringing an individual up to a desired level or standard of proficiency. This can be done by means of 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	
Unit aim (s)	This unit assesses certain aspects of the occupational competence needed to ensure the safe handling or preparation of food in a retail environment. The food concerned may be wrapped or unwrapped, and may include food subject to temperature control. The unit covers monitoring critical control points and using the findings of those monitoring activities to improve the processes that affect food safety.
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>This unit requires workplace assessment of occupational competence.</p> <p>Simulation is not allowed for any performance evidence within this unit.</p> <p>If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.</p> <p>The candidate may have undertaken formal food safety training that may contribute to the evidence for this unit.</p> <p>The terms highlighted in bold in the assessment criteria are explained in a glossary appended to this unit.</p> <p>Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)</p>
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	D/503/5681 Manage staff to receive goods in a retail environment
Level:	3
Credit value:	5
GLH:	24
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to manage staff to receive and check incoming deliveries of goods in a retail environment	<p>1.1 Select sufficient staff to prepare for, receive and check expected incoming deliveries of goods</p> <p>1.2 Explain to staff, in advance of deliveries of goods arriving: what needs to be done to prepare the receiving area what needs to happen when the expected deliveries arrive</p> <p>1.3 Assess whether the area for receiving goods has been adequately prepared to ensure safe and secure unloading of goods</p> <p>1.4 Assess whether there is enough storage space of the right type for the expected goods</p> <p>1.5 Ensure that goods are unloaded safely and securely</p> <p>1.6 Explain why incoming goods should be checked against requirements immediately after unloading</p> <p>1.7 Ensure that incoming goods are checked against requirements immediately after unloading</p> <p>1.8 Ensure that delivery records are completed in line with organisational procedures</p> <p>1.9 Evaluate records of deliveries of goods to determine whether each supplier has met the organisation's service needs</p> <p>1.10 Resolve problems with deliveries of goods in line with organisational procedures</p>

Additional information about this unit N/A		
Unit aim (s)	This unit assesses the occupational competence of a team leader or senior team member to manage staff to receive goods.	
Assessment requirements specified by a sector or regulatory body (if appropriate)	This unit requires workplace assessment of occupational competence. Simulation is not allowed for any performance evidence within this unit. Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)	
Details of the relationship of the unit and relevant national occupational standards	N/A	

Title:	H/503/5682 Organise and monitor the storage of stock in a retail environment
Level:	3
Credit value:	6
GLH:	27
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the causes and prevention of stock loss within storage systems	1.1 Explain the causes of stock deterioration, loss and damage 1.2 Explain how to reduce stock loss within storage systems
2. Understand the legal and organisational requirements for storing stock	2.1 Explain the legal and organisational requirements for storing stock, including health and safety requirements and the removal of out-of-date stock
3. Be able to organise the use of storage facilities in a retail environment	3.1 Organise storage facilities to take account of: day-to-day work safety requirements the need to keep stock secure the need to keep stock in a saleable condition 3.2 Train staff to use the storage system: securely safely in line with relevant legal requirements 3.3 Assign staff clear roles and responsibilities for storing and moving stock 3.4 Develop plans to cope with unforeseen storage problems that take account of available resources 3.5 Review plans for coping with unforeseen storage problems 3.6 Revise plans to cope with unforeseen storage problems, taking account of any relevant factors

	<p>3.7 Monitor storage operations to ensure that staff are storing and moving stock: securely safely in line with relevant legal requirements</p> <p>3.8 Maintain stock records that are in line with organisational procedures</p>
<p>4. Be able to monitor the storage and care of stock in a retail environment</p>	<p>4.1 Maintain a routine that meets the organisation's requirements for checking the quality of storage facilities and stock</p> <p>4.2 Perform spot checks of storage facilities and stock</p> <p>4.3 Train staff to: identify stock that is out of date or at risk of deteriorating deal with stock that is out of date or at risk of deteriorating in line with legal requirements and organisational procedures</p> <p>4.4 Monitor the storage and movement of stock to make sure that stock is reaching the shop floor as it is needed</p> <p>4.5 Recommend to decision makers ways of running storage and stock movement systems more profitably</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit assesses the occupational competence of a team leader or senior member of a retail team who is responsible for monitoring the quality of stock and use of storage facilities.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>This unit requires workplace assessment of occupational competence.</p> <p>Simulation is not allowed for any performance evidence within this unit.</p> <p>Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>N/A</p>

Title:	L/503/5692 Maintain the availability of goods on display in a retail environment to promote sales
Level:	3
Credit value:	6
GLH:	30
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how the display of goods can promote sales	1.1 Explain how different types of display help the store to reach its sales targets 1.2 Explain how the way that information is positioned within displays can help to promote sales 1.3 Explain how the layout of the selling area affects sales
2. Understand legal and organisational requirements for displaying goods	2.1 Explain the organisational and legal requirements for displaying descriptions and prices of goods 2.2 Explain the organisation's standards for putting displays together, including standards for cleaning and preparation 2.3 Explain the security, health and safety requirements and procedures relating to displaying goods 2.4 Explain customers' legal rights in relation to the display of goods
3. Be able to organise staff to display goods for retail sale	3.1 Explain to staff the purpose of the display and the requirements and standards it must meet, including standards for health and safety and security 3.2 Ask staff questions to check their understanding of the requirements and standards for the display 3.3 Ensure that staff prepare the display area: safely with the minimum of inconvenience to customers

	<p>3.4 Ensure that staff put the display together: safely with the minimum of inconvenience to customers</p> <p>3.5 Explain the importance of consulting an authorised decision-maker before modifying or changing the display</p> <p>3.6 Ensure that the records kept of displays are in line with organisational procedures</p>
4. Be able to evaluate the effectiveness of displays	<p>4.1 Evaluate the effectiveness of displays in relation to: their intended purpose legal and organisational requirements and standards</p> <p>4.2 Evaluate information within displays to ensure that its content and position are: legally compliant likely to promote sales</p> <p>4.3 Ask staff for suggestions for making the display more appealing to customers</p> <p>4.4 Explain the importance of dealing promptly with any risks to security or health and safety that arise when evaluating displays</p>
5. Be able to maintain the required quantity and quality of goods on display	<p>5.1 Provide accurate, up-to-date pricing information to the staff who need it</p> <p>5.2 Monitor price marking to ensure that it is correct</p> <p>5.3 Resolve any pricing problems that arise</p> <p>5.4 Develop stock replenishment plans to maintain the required quantity and quality of goods on display</p> <p>5.5 Organise the removal of stock of unsaleable quality from display</p>
Additional information about this unit	
N/A	
Unit aim (s)	This unit assesses the occupational competence of individuals who are responsible for organising staff to set up and maintain displays. The learner does not need specialist visual merchandising skills to achieve this unit.
Assessment requirements specified by a sector or regulatory body (if appropriate)	This unit requires workplace assessment of occupational competence.

	<p>Simulation is not allowed for any performance evidence within this unit.</p> <p>Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)</p>
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	R/503/5693 Manage the payment transaction process in a retail environment
Level:	3
Credit value:	9
GLH:	43
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to monitor payment transaction processing in a retail environment	<p>1.1 Explain the aims that takings practices and procedures are designed to achieve</p> <p>1.2 Monitor the way staff process payment transactions, ensuring they are processed: in line with organisational processing requirements in ways that attempt to maintain goodwill</p> <p>1.3 Perform checks to ensure that equipment is providing information concerning payment transactions that is: up to date accurate</p> <p>1.4 Follow organisational procedures to take action to resolve any instances of: payment transaction processing not meeting organisational processing requirements payment transactions not being processed in ways that attempt to maintain goodwill out of date or inaccurate information</p>
2. Be able to manage the operation of payment points in a retail environment	<p>2.1 Perform checks to ensure that staff set up and operate payment points in line with organisational procedures</p> <p>2.2 Resolve any operational problems with payment points when within own authority to do so</p> <p>2.3 Monitor the way that payments are handled, ensuring that staff are following organisational procedures</p> <p>2.4 Develop contingency plans to deal with unexpected problems at payment points</p>

Additional information about this unit

N/A

Unit aim (s)	This unit assesses the occupational competence of individuals who are responsible for managing the way payments are processed by staff at point of sale in a retail environment.
Assessment requirements specified by a sector or regulatory body (if appropriate)	This unit requires workplace assessment of occupational competence. Simulation is not allowed for any performance evidence within this unit. Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	D/503/5731 Contribute to the continuous improvement of retail operations within own area of responsibility
Level:	3
Credit value:	10
GLH:	47
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how own area of responsibility can contribute to the overall success of the retail organisation	<p>1.1 Explain characteristics of the organisation's brand image, customer base and desired market position</p> <p>1.2 Explain the relationship between the agreed performance measures for own area of responsibility and the organisation's brand image and desired market position</p> <p>1.3 Explain how systems and procedures in own area of responsibility are intended to support the achievement of organisational performance measures</p> <p>1.4 Explain the potential causes of failure to achieve organisational performance measures in the type of retail operations carried out in own area of responsibility</p>
2. Understand how to motivate staff in own area of responsibility to support and contribute to the continuous improvement of retail operations	<p>2.1 Explain why it is important for staff to understand the purpose and intended benefits of improvements to retail operations</p> <p>2.2 Explain how own manner when explaining improvements can affect staff's response to these</p> <p>2.3 Explain the importance of encouraging staff to suggest ideas for improvements to retail operations</p> <p>2.4 Explain the importance of ensuring that colleagues receive the credit if their ideas are implemented</p> <p>2.5 Explain the importance of showing enthusiasm and leading by example when putting improvements into practice</p>

<p>3. Be able to evaluate achievements of organisational performance measures for retail operations within own area of responsibility</p>	<p>3.1 Evaluate organisational performance within own area of responsibility using information that is: relevant reliable up to date</p>
<p>4. Be able to develop recommendations for improving the effectiveness of retail operations</p>	<p>4.1 Develop ideas to improve the effectiveness of operations in own area of responsibility 4.2 Evaluate which ideas for improvements to the effectiveness of operations in own area of responsibility should be put forward to decision makers, based on the extent to which the ideas are: consistent with the organisation's brand image consistent with organisational policy achievable, given the available resources beneficial to the organisation and its customers</p>
<p>5. Be able to recommend ideas for improving the effectiveness of retail operations to decision makers</p>	<p>5.1 Present ideas to decision makers for possible improvements, doing so: with supporting facts acknowledge any contributions made by other people 5.2 Explain to decision makers the benefits the recommended improvements could bring 5.3 Justify to decision makers the resources needed to put improvements into practice 5.4 Clarify any aspects of the recommended improvements decision makers wish to discuss further</p>
<p>6. Be able to contribute to the implementation of planned improvements to retail operations within own area of responsibility</p>	<p>6.1 Explain planned improvements to staff in ways that attempt to: 6.2 Ensure that staff have everything they need to implement proposed changes including additional training 6.3 Seek advice and support to resolve any problems with implementing proposed changes that are not within own authority to resolve 6.4 Demonstrate to staff own commitment to achieving the benefits of proposed changes through own behaviour</p>

Additional information about this unit

N/A

Unit aim (s)	This unit assesses the occupational competence of a first line manager or senior team member in relation to the contribution they make to improving operations within their own area of responsibility. The learner could contribute to improving performance against any operational measure set by the organisation, such as sales targets, service standards or quality standards.
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>This unit requires workplace assessment of occupational competence.</p> <p>Simulation is not allowed for any performance evidence within this unit.</p> <p>It is highly unlikely that the assessor will be able to gather evidence for this unit by observing workplace activity. Evidence can, however, come from professional discussion supported by oral reports of real achievements and testimony from an expert witness.</p> <p>AC 4.2: If the organisation does not have a written policy, learners need to ask their manager for broad guidelines and follow these where the unit refers to a policy.</p> <p>Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)</p>
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	H/503/5732 Manage the prevention of wastage and loss in a retail environment
Level:	3
Credit value:	11
GLH:	50
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the purpose of loss-control and stock-taking systems	1.1 Explain the purpose of loss-control and stock-taking systems
2. Be able to monitor own work area security in a retail environment	2.1 Monitor the work area to detect any problems with security 2.2 Implement security measures in line with: legislation organisational requirements
3. Be able to promote security consciousness to colleagues	3.1 Provide information to colleagues on: responsibilities for maintaining security maintenance of security in own work area when opening, operating and closing the retail unit those with authority to stop and search staff and customers the items most likely to be stolen from own work area
4. Be able to investigate loss of stock, equipment, cash and cash equivalents	4.1 Monitor levels of stock, equipment, cash and cash equivalents in line with organisational procedures to enable loss to be detected 4.2 Record losses in line with organisational procedures 4.3 Follow organisational procedures to investigate the cause of losses

<p>5. Be able to take measures to prevent wastage and loss</p>	<p>5.1 Provide information to colleagues on: the nature and extent of wastage and loss how wastage and loss can occur the problems caused by wastage and loss how they can help to prevent wastage and loss</p> <p>5.2 Evaluate potential methods for preventing wastage and loss</p> <p>5.3 Implement methods to prevent wastage and loss</p> <p>5.4 Evaluate the effectiveness of wastage and loss prevention measures</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit assesses the occupational competence of individuals who are responsible for preventing wastage and loss in their work area, both by their own actions and by promoting security consciousness to colleagues.</p> <p>For the purposes of this unit, 'loss' means the loss of stock, equipment, cash and cash equivalents through theft or fraud. 'Wastage' means the loss of stock through deterioration or damage.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>This unit requires workplace assessment of occupational competence.</p> <p>It is expected that simulation will be used to gather evidence of security measures being implemented to deal with or contain:</p> <ul style="list-style-type: none"> security risks threats to security breaches of security actual or suspected incidents of theft <p>This unit can be assessed independently of other units. However, it may be possible to generate some of the evidence for this unit holistically when gathering evidence for other units in the same qualification.</p>

	Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	K/503/5733 Produce staffing schedules to help a retail team to achieve its targets
Level:	3
Credit value:	5
GLH:	22
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the uses of and constraints upon the staffing schedules for a retail team	<p>1.1 Explain the relationship between staffing schedules and the achievement of work targets within a retail team</p> <p>1.2 Explain the factors other than staffing that may affect progress towards work targets, and the effect these are likely to have</p> <p>1.3 Explain what can happen if requirements are not complied with when drawing up staffing schedules including: legal requirements organisational requirements contracts of employment</p>
2. Be able to produce staffing schedules for a retail team	<p>2.1 Produce staffing schedules that: cover all the operational needs that the team is responsible for meeting take account of the operational constraints that apply take account of the existing skills of staff show how work will be allocated between available staff show the locations where individuals will work show the times when individuals will start and finish work comply with relevant laws, organisational policy relating to working hours and individual contracts of employment attempt to make it easy for team members to understand and use include contingency plans to cope with unusual situations</p>

3. Be able to adjust staffing schedules to take account of changing operational needs and constraints	3.1 Monitor the progress of the team towards meeting operational needs 3.2 Adjust staffing schedules where necessary and possible to ensure that operational needs can be met
Additional information about this unit N/A	
Unit aim (s)	This unit assesses the occupational competence of team leaders and other senior team members who are responsible for ensuring that there is adequate cover within their team to ensure that targets will be met. This includes producing staffing schedules, adjusting schedules as needed.
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>This unit requires workplace assessment of occupational competence.</p> <p>Simulation is not allowed for any performance evidence within this unit.</p> <p>If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.</p> <p>AC 2.1: If the organisation does not have a written policy, learners need to ask their manager for broad guidelines and follow these where the unit refers to a policy.</p> <p>Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)</p>
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	M/503/5734 Monitor and maintain health and safety in a retail environment
Level:	3
Credit value:	13
GLH:	60
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand own role in controlling risks to health and safety in a retail environment	<p>1.1 Explain own rights and responsibilities under current legislation relating to: health and safety at work managing health and safety at work reporting injuries, diseases and dangerous occurrences substances that can endanger health first aid fire precautions</p> <p>1.2 Describe sources of information and advice about health and safety legislation, policy and procedures</p> <p>1.3 Explain how to control health and safety hazards in relation to own role</p> <p>1.4 Describe methods of containing threatening and/or violent behaviour</p> <p>1.5 Explain how to control threatening and/or violent behaviour</p>
2. Understand own responsibility for implementing accident and emergency procedures in a retail environment	<p>2.1 Explain how people can react in the event of accidents and emergencies</p> <p>2.2 Explain the importance of staying calm in the event of an accident or emergency</p> <p>2.3 Describe organisational procedures for raising alarms</p> <p>2.4 Explain own responsibilities in relation to evacuating the workplace in the event of an accident or emergency</p> <p>2.5 Describe escape routes from own work place including how to reach and use them safely</p>

<p>3. Be able to control risks to health and safety in a retail environment</p>	<p>3.1 Monitor own working area to ensure that: it is free from risks to health and safety colleagues are using any personal protective equipment in line with organisational procedures</p> <p>3.2 Seek advice immediately from the designated person when having difficulty controlling a risk to health and safety</p> <p>3.3 Provide training to colleagues on safe working practices</p> <p>3.4 Implement health and safety checks in line with organisational procedures</p>
<p>4. Be able to conduct risk assessments in a retail environment</p>	<p>4.1 Explain why risk assessments are necessary in a retail environment</p> <p>4.2 Conduct risk assessments in such a way as to detect any significant risks to health and safety</p> <p>4.3 Prioritise risks in the order they should be dealt with</p> <p>4.4 Record risk assessments in line with organisational procedures</p> <p>4.5 Make risk assessment records available to those who need them</p> <p>4.6 Review risk assessment procedures to take account of changes in factors affecting health and safety</p> <p>4.7 Update risk assessment procedures as needed</p>
<p>5. Be able to implement accident and emergency procedures in a retail environment</p>	<p>5.1 Take action in line with organisational procedures to prevent injury when emergencies occur in the workplace</p> <p>5.2 Take action in line with organisational procedures to prevent damage to property when emergencies occur in the workplace</p> <p>5.3 Take action in line with organisational procedures to contain potentially unsafe situations in the work area</p> <p>5.4 Seek immediate help from an appropriate source in the event of accidents and emergencies</p> <p>5.5 Use safety equipment in the event of an accident or emergency in line with the organisation's and/or manufacturer's guidelines</p>

	<p>5.6 Ensure when the building is being evacuated that:</p> <ul style="list-style-type: none"> colleagues and customers leave the building immediately colleagues and customers use designated escape routes to leave the building officials responding to requests for help are given access <p>5.7 Act immediately to isolate anyone acting violently or making threats</p> <p>5.8 Take action to protect colleagues and customers from anyone acting violently or making threats</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit assesses occupational competence in relation to monitoring the workplace for health and safety risks and taking action to reduce those risks, including carrying out formal risk assessments.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>This unit requires workplace assessment of occupational competence.</p> <p>It is expected that simulation will be used to gather evidence for the implementation of accident and emergency procedures. Evidence of competence in implementing evacuation procedures will take account of specific training in these procedures.</p> <p>This unit can be assessed independently of other units. However, it may be possible to generate some of the evidence for this unit holistically when gathering evidence for other units in the same qualification.</p> <p>AC 1.2: If the organisation does not have a written policy, learners need to ask their manager for broad guidelines and follow these where the unit refers to a policy.</p> <p>Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)</p>

Details of the relationship of the unit and relevant national occupational standards	N/A
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Title:	F/503/5737 Monitor and support secure payment point use during trading hours
Level:	3
Credit value:	3
GLH:	13
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the data security risks associated with payment point use	1.1 Explain who is authorised to remove cash or cash equivalents from payment points during trading hours 1.2 Explain the data security risks that can arise at a payment point
2. Be able to monitor and support secure payment point use during trading hours	2.1 Monitor the payment point during trading hours to ensure that staff are following organisational procedures for keeping customers' personal data confidential 2.2 Authorise payment point transactions and adjustments in line with organisational procedures for: customer service security stock control 2.3 Replenish change in payment points in line with organisational procedures
Additional information about this unit	
N/A	
Unit aim (s)	This unit assesses the occupational competence of individuals who are responsible for maintaining the secure use of single or multiple payment points during trading hours.

<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>This unit requires workplace assessment of occupational competence.</p> <p>Simulation is not allowed for any performance evidence within this unit.</p> <p>Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>N/A</p>

Title:	M/600/9600 Set objectives and provide support for team members
Level:	3
Credit value:	5
GLH:	35
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to communicate a team's purpose and objectives to the team members	1.1 Describe the purpose of a team 1.2 Set team objectives with its members which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound) 1.3 Communicate the team's purpose and objectives to its members
2. Be able to develop a plan with team members showing how team objectives will be met	2.1 Discuss with team members how team objectives will be met 2.2 Ensure team members participate in the planning process and think creatively 2.3 Develop plans to meet team objectives 2.4 Set SMART personal work objectives with team members
3. Be able to support team members identifying opportunities and providing support	3.1 Identify opportunities and difficulties faced by team members 3.2 Discuss identified opportunities and difficulties with team members 3.3 Provide advice and support to team members to overcome identified difficulties and challenges 3.4 Provide advice and support to team members to make the most of identified opportunities
4. Be able to monitor and evaluate progress and recognise individual and team achievement	4.1 Monitor and evaluate individual and team activities and progress 4.2 Provide recognition when individual and team objectives have been achieved
Additional information about this unit	
N/A	

Unit aim (s)	This unit is a cross-sector management and leadership unit that is suitable for first line managers in the retail sector.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Assessment guidance for this unit is provided in the Assessment Strategy for management and leadership qualifications. The Strategy is available from CfA Business Skills @ Work.
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	Y/600/9669 Plan, allocate and monitor work of a team
Level:	3
Credit value:	5
GLH:	25
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to plan work for a team	1.1 Agree team objectives with own manager 1.2 Develop a plan for a team to meet agreed objectives, taking into account capacity and capabilities of the team
2. Be able to allocate work across a team	2.1 Discuss team plans with a team 2.2 Agree work allocation and SMART (Specific, Measurable, Achievable, Realistic and Time-bound) objectives with team members 2.3 Agree standard of work required by team
3. Be able to manage team members to achieve team objectives	3.1 Support all team members in order to achieve team objectives
4. Be able to monitor and evaluate the performance of team members	4.1 Assess team members' work against agreed standards and objectives 4.2 Identify and monitor conflict within a team 4.3 Identify causes for team members not meeting team objectives
5. Be able to improve the performance of a team	5.1 Identify ways of improving team performance 5.2 Provide constructive feedback to team members to improve their performance 5.3 Implement identified ways of improving team performance
Additional information about this unit	
N/A	
Unit aim (s)	This unit is a cross-sector management and leadership unit that is suitable for first line managers in the retail sector.

<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Assessment guidance for this unit is provided in the Assessment Strategy for management and leadership qualifications. The Strategy is available from CfA Business Skills @ Work.</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>N/A</p>

Title:	F/600/9715 Make effective decisions
Level:	3
Credit value:	3
GLH:	10
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to identify circumstances that require a decision to be made	1.1 Explain the circumstances requiring a decision to be made 1.2 State the desired objective(s) for making a decision 1.3 Establish criteria on which to base the decision, in line with own organisation
2. Be able to collect information to inform decision-making	2.1 Identify information needed to inform the decision-making process 2.2 Communicate with stakeholders affected by the decision 2.3 Explain how to inform stakeholders about the decision-making process
3. Be able to analyse information to inform decision-making	3.1 Identify information for validity and relevance to the decision-making process 3.2 Analyse information and against established criteria
4. Be able to make a decision	4.1 Apply decision-making technique(s) to determine a decision 4.2 Explain the decision made in line with desired objectives 4.3 Communicate the decision taken to relevant stakeholders
Additional information about this unit N/A	
Unit aim (s)	This unit is a cross-sector management and leadership unit that is suitable for first line managers in the retail sector.

<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Assessment guidance for this unit is provided in the Assessment Strategy for management and leadership qualifications. The Strategy is available from CfA Business Skills @ Work.</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>N/A</p>

Title:	R/600/9685 Manage conflict in a team
Level:	3
Credit value:	3
GLH:	20
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to support team members' understanding of their role and position within a team	1.1 Communicate to team members the standards of work and behaviour expected of them 1.2 Explain how team members can work together and support each other
2. Be able to take measures to minimise conflict within a team	2.1 Identify issues with organisational structures, systems or procedures that are likely to give rise to conflict 2.2 Identify potential conflict between team members 2.3 Explain action required to avoid potential conflict and agree strategies for conflict resolution
3. Be able to understand how to encourage team members to resolve their own conflicts	3.1 Explain how team members can be encouraged to identify and resolve their own problems and conflicts 3.2 Explain how respect can be developed and maintained between team members
4. Be able to understand legal and organisational requirements concerning conflict	4.1 Explain legal and organisational requirements concerning conflict in own team 4.2 Explain how to maintain complete, accurate and confidential records of conflicts and their outcomes
Additional information about this unit	
N/A	
Unit aim (s)	This unit is a cross-sector management and leadership unit that is suitable for first line managers in the retail sector.

<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Assessment guidance for this unit is provided in the Assessment Strategy for management and leadership qualifications. The Strategy is available from CfA Business Skills @ Work.</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>N/A</p>

Title:	M/600/9628 Manage or support equality of opportunity, diversity and inclusion in own area of responsibility
Level:	3
Credit value:	4
GLH:	20
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand own responsibilities under equality legislation, relevant codes of practice and own organisational policies	1.1 Explain how equality of opportunity, diversity and inclusion relate to legal, industry requirements and organisational policies 1.2 Describe how equality of opportunity diversity and inclusion are considered in planning in own area of responsibility
2. Be able to communicate an organisation's written equality, diversity and inclusion policy and procedures in own area of responsibility	2.1 Outline an organisation's equality, diversity and inclusion policy and procedures
3. Be able to monitor equality, diversity and inclusion within own area of responsibility	3.1 Monitor how equality, diversity and inclusion activities in own area of responsibility are in line with own organisation
Additional information about this unit	
N/A	
Unit aim (s)	This unit is a cross-sector management and leadership unit that is suitable for first line managers in the retail sector.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Assessment guidance for this unit is provided in the Assessment Strategy for management and leadership qualifications. The Strategy is available from CfA Business Skills @ Work.
Details of the relationship of the unit and relevant national occupational standards	NA

Title:	Y/601/1230 Organise the delivery of reliable customer service
Level:	3
Credit value:	6
GLH:	40
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Plan and organise the delivery of reliable customer service	<p>1.1 Plan, prepare and organise everything they need to deliver services or products to different types of customers</p> <p>1.2 Organise what they do to ensure that they are consistently able to give prompt attention to your customers</p> <p>1.3 Reorganise their work to respond to unexpected additional workloads</p>
2. Review and maintain customer service delivery	<p>2.1 Maintain service delivery during very busy periods and unusually quiet periods</p> <p>2.2 Maintain service delivery when systems, people or resources have let them down</p> <p>2.3 Consistently meet their customers' expectations</p> <p>2.4 Balance the time they take with their customers with the demands of other customers seeking their attention</p> <p>2.5 Respond appropriately to their customers when customers make comments about the products or services they are offering</p> <p>2.6 Alert others to repeated comments made by their customers</p> <p>2.7 Take action to improve the reliability of their service based on customer comments</p> <p>2.8 Monitor the action they have taken to identify improvements in the service they give to their customers</p>

<p>3. Use recording systems to maintain reliable customer service</p>	<p>3.1 Record and store customer service information accurately following organisational guidelines</p> <p>3.2 Select and retrieve customer service information that is relevant, sufficient and in an appropriate format</p> <p>3.3 Quickly locate information that will help solve a customer's query</p> <p>3.4 Supply accurate customer service information to others using the most appropriate method of communication</p>
<p>4. Understand how to organise the delivery of reliable customer service</p>	<p>4.1 Describe organisational procedures for unexpected situations and their role within them</p> <p>4.2 Describe resource implications in times of staff sickness and holiday periods and their responsibility at these times</p> <p>4.3 Explain the importance of having reliable and fast information for their customers and their organisation</p> <p>4.4 Evaluate the organisational procedures and systems for delivering customer service</p> <p>4.5 Identify useful customer feedback and explain how to decide which feedback should be acted on</p> <p>4.6 Describe how to communicate feedback from customers to others</p> <p>4.7 Evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information</p> <p>4.8 Explain the legal and regulatory requirements regarding the storage of data</p>
<p>Additional information about this unit</p> <p>N/A</p>	

<p>Unit aim (s)</p>	<p>This unit is about how the learner delivers and maintains excellent and reliable customer service. The role of the learner may or may not involve supervisory or management responsibilities but they are expected to take some responsibility for the resources and systems they use which support the service that they give. In the learner’s job they must be alert to customer reactions and know how they can be used to improve the service that they give. In addition, customer service information must be recorded to support reliable service.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Specified in the Customer Service Assessment Strategy 2010</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>This Unit directly relates to Unit B10 of the Customer Service NOS 2010</p>

Title:	H/601/1232 Improve the customer relationship
Level:	3
Credit value:	7
GLH:	47
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Improve communication with their customers	<p>1.1 Select and use the best method of communication to meet their customers' expectations</p> <p>1.2 Take the initiative to contact their customers to update them when things are not going to plan or when they require further information</p> <p>1.3 Adapt their communication to respond to individual customers' feelings</p>
2. Balance the needs of their customer and their organisation	<p>2.1 Meet their customers' expectations within their organisation's service offer</p> <p>2.2 Explain the reasons to their customers sensitively and positively when customer expectations cannot be met</p> <p>2.3 Identify alternative solutions for their customers either within or outside the organisation</p> <p>2.4 Identify the costs and benefits of these solutions to their organisation and to their customers</p> <p>2.5 Negotiate and agree solutions with their customers which satisfy them and are acceptable to their organisation</p> <p>2.6 Take action to satisfy their customers with the agreed solution when balancing customer needs with those of their organisation</p>
3. Exceed customer expectations to develop the relationship	<p>3.1 Make extra efforts to improve their relationship with their customers</p> <p>3.2 Recognise opportunities to exceed their customers' expectations</p>

	<p>3.3 Take action to exceed their customers' expectations within the limits of their own authority</p> <p>3.4 Gain the help and support of others to exceed their customers' expectations</p>
4. Understand how to improve the customer relationship	<p>4.1 Describe how to make best use of the method of communication chosen for dealing with their customers</p> <p>4.2 Explain how to negotiate effectively with their customers</p> <p>4.3 Explain how to assess the costs and benefits to their customers and their organisation of any unusual agreement they make</p> <p>4.4 Explain the importance of customer loyalty and/or improved internal customer relationships to their organisation</p>
Additional information about this unit	
N/A	
Unit aim (s)	This unit is a cross-sector customer service unit owned by CfA Business Skills @ Work.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Assessment guidance for this unit is provided in the CfA Assessment Strategy for Customer Service qualifications.
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	D/601/1553 Work with others to improve customer service
Level:	3
Credit value:	8
GLH:	53
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Improve customer service by working with others	1.1 Contribute constructive ideas for improving customer service 1.2 Identify what they have to do to improve customer service and confirm this with others 1.3 Agree with others what they have to do to improve customer service 1.4 Co-operate with others to improve customer service 1.5 Keep their commitments made to others 1.6 Make others aware of anything that may affect plans to improve customer service
2. Monitor their own performance when improving customer service	2.1 Discuss with others how what they do affects customer service performance 2.2 Identify how the way they work with others contributes towards improving customer service
3. Monitor team performance when improving customer service	3.1 Discuss with others how teamwork affects customer service performance 3.2 Work with others to collect information on team customer service performance 3.3 Identify with others how customer service teamwork could be improved 3.4 Take action with others to improve customer service performance
4. Understand how to work with others to improve customer service	4.1 Describe who else is involved either directly or indirectly in the delivery of customer service 4.2 Describe the roles and responsibilities of others in their organisation

	<p>4.3 Describe the roles of others outside their organisation who have an impact on their services or products</p> <p>4.4 Evaluate what the goals or targets of their organisation are in relation to customer service and how these are set</p> <p>4.5 Evaluate how their organisation identifies improvements in customer service</p>
<p>Additional information about this unit</p> <p>N/A</p>	
Unit aim (s)	<p>Teamwork is a key component of delivering and improving excellent customer service. The people the learner works with to improve customer service may include one or more of the following: team members; colleagues; suppliers; service partners; supervisors; managers; team leaders. The delivery of excellent customer service depends on their skills and those of others. It involves communicating with each other and agreeing how they can work together to give a more effective service. They all need to work together positively. The learner must also monitor their own and the team's performance and change the way they do things if that improves customer service. This unit is about how the learner develops a relationship with others to improve their customer service performance.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>Specified in the Customer Service Assessment Strategy 2010</p>
Details of the relationship of the unit and relevant national occupational standards	<p>This Unit directly relates to Unit D8 of the Customer Service NOS 2010</p>

Title:	J/601/1515 Monitor and solve customer service problems
Level:	3
Credit value:	6
GLH:	40
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Solve immediate customer service problems	<p>1.1 Respond positively to customer service problems following organisational guidelines</p> <p>1.2 Solve customer service problems when they have sufficient authority</p> <p>1.3 Work with others to solve customer service problems</p> <p>1.4 Keep customers informed of the actions being taken</p> <p>1.5 Check with customers that they are comfortable with the actions being taken</p> <p>1.6 Solve problems with service systems and procedures that might affect customers before customers become aware of them</p> <p>1.7 Inform managers and colleagues of the steps taken to solve specific problems</p>
2. Identify repeated customer service problems and options for solving them	<p>2.1 Identify repeated customer service problems</p> <p>2.2 Identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option</p> <p>2.3 Work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of the organisation</p>

<p>3. Take action to avoid the repetition of customer service problems</p>	<p>3.1 Obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated</p> <p>3.2 Action their agreed solution</p> <p>3.3 Keep their customers informed in a positive and clear manner of steps being taken to solve any service problems</p> <p>3.4 Monitor the changes they have made and adjust them if appropriate</p>
<p>4. Understand how to monitor and solve customer service problems</p>	<p>4.1 Describe organisational procedures and systems for dealing with customer service problems</p> <p>4.2 Describe the organisational procedures and systems for identifying repeated customer service problems</p> <p>4.3 Explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers</p> <p>4.4 Explain how to negotiate with and reassure customers while their problems are being solved</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>The learner's job involves delivering and organising excellent customer service. However good the service provided, some of their customers will experience problems and the learner will spot and solve other problems before their customers even know about them. This Unit is about the part of their job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of their customer service by the way that the learner solves customer service problems. The learner can impress customers and build customer loyalty by sorting out those problems efficiently and effectively.</p>

	Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Specified in the Customer Service Assessment Strategy 2010
Details of the relationship of the unit and relevant national occupational standards	This Unit directly relates to Unit C5 of the Customer Service NOS 2010

Title:	H/601/1554 Promote continuous improvement
Level:	3
Credit value:	7
GLH:	47
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Plan improvements in customer service based on customer feedback	<p>1.1 Gather feedback from customers that will help to identify opportunities for customer service improvement</p> <p>1.2 Analyse and interpret feedback to identify opportunities for customer service improvements and propose changes</p> <p>1.3 Discuss with others the potential effects of any proposed changes for their customers and their organisation</p> <p>1.4 Negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change</p>
2. Implement changes in customer service	<p>2.1 Organise the implementation of authorised changes</p> <p>2.2 Implement the changes following organisational guidelines</p> <p>2.3 Inform people inside and outside their organisation who need to know of the changes being made and the reasons for them</p> <p>2.4 Monitor early reactions to changes and make appropriate fine-tuning adjustments</p>
3. Review changes to promote continuous improvement	<p>3.1 Collect and record feedback on the effects of changes</p> <p>3.2 Analyse and interpret feedback and share their findings on the effects of changes with others</p> <p>3.3 Summarise the advantages and disadvantages of the changes</p>

	<p>3.4 Use their analysis and interpretation of changes to identify opportunities for further improvement</p> <p>3.5 Present these opportunities to somebody with sufficient authority to make them happen</p>
4. Understand how to promote continuous improvement	<p>4.1 Review how service improvements in their area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements</p> <p>4.2 Explain how customer experience is influenced by the way service is delivered</p> <p>4.3 Explain how to collect, analyse and present customer feedback</p> <p>4.4 Explain how to make a business case to others to bring about change in the products or services they offer</p>
Additional information about this unit	
N/A	
Unit aim (s)	This unit covers the key competence of the customer service professional. The learner must be dedicated to the continuous improvement of customer service and this involves organising changes in the way customer service is delivered over and over again. The learner will need to identify potential changes, think through their consequences and make them work. Above all, this unit covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Specified in the Customer Service Assessment Strategy 2010
Details of the relationship of the unit and relevant national occupational standards	This Unit directly relates to Unit D9 of the Customer Service NOS 2010