Level 3 Certificate Diploma in Retail Skills (Management) (7384-30/33)

Candidate logbook
600/4101/8
600/4064/6

About City & Guilds

As the UK's leading vocational education 2ecognized2n, City & Guilds is leading the talent revolution by inspiring people to unlock their potential and develop their skills. We offer over 500 qualifications across 28 industries through 8500 centres worldwide and award around two million certificates every year. City & Guilds is 2ecognized and respected by employers across the world as a sign of quality and exceptional training.

City & Guilds Group

The City & Guilds Group operates from three major hubs: London (servicing Europe, the Caribbean and Americas), Johannesburg (servicing Africa), and Singapore (servicing Asia, Australia and New Zealand). The Group also includes the Institute of Leadership & Management (management and leadership qualifications), City & Guilds Land Based Services (land-based qualifications), the Centre for Skills Development (CSD works to improve the policy and practice of vocational education and training worldwide) and Learning Assistant (an online e-portfolio).

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Level 3 Certificate Diploma in Retail Skills (Management) (7384-30/33)

Candidate logbook

Version and date	Change detail	Section
1.1 Jan 2012	Additional Sections added	Candidate Record of Achievement **&** Expert/Witness Status list
2.0 May 2016	Additional units added 206, 261 and 334	Units

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Contents

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1   About your candidate logbook

1.1 Contact details

Candidate name	
Candidate enrolment no	
Centre name	
Centre number	
Programme start date	
Date of registration with City & Guilds	

Keep a record of relevant contact details in the space provided below. You may find it helpful to make a note of phone numbers and e-mail addresses here.

Your Assessor(s)	
Your Internal Verifier	
Quality Assurance Contact	

1   About your candidate logbook

1.2 Introduction to the logbook

This logbook will help you complete the units in City & Guilds' **Level 3 Certificate Diploma in Retail Skills (Management)** (7384-30/33). It contains forms you can use to record your evidence of what you have done.

There are 23 units in total available in this qualification. You should discuss and agree with your assessor/tutor which of these units you are going to work towards. The units in this logbook are for the Level 3 qualification.

About City & Guilds

City & Guilds is your awarding body for this qualification. City & Guilds is the UK's leading awarding body for vocational qualifications.

Information about City & Guilds and our qualifications is available on our website **www.cityandguilds.com**.

2 Units

To achieve the Level 3 Certificate in Retail Skills (Management), learners must achieve a minimum of **31** credits overall. All **31** credits must be achieved at level 3, of which;

- **10** credits must come from the mandatory unit in group A
- A minimum of **21** credits must come from the level 3 optional units
- A minimum of **11** credits must come from group B
- A maximum of **10** credits can come from the imported units in group C

City & Guilds unit	Unit title	GLH	Credit value
	Mandatory		
316	Work effectively and support others in a retail organisation (E.08)	50	10
	Optional		
301	Audit stock levels and stock inventories in a retail environment (B.15)	28	6
302	Source required goods and services in a retail environment (B.16)	52	10
303	Monitor and help improve food safety in a retail environment (B.22)	50	11
304	Manage staff to receive goods in a retail environment (B.37)	24	5
305	Organise and monitor the storage of stock in a retail environment (B.38)	27	6
306	Maintain the availability of goods on display in a retail environment to promote sales (C.13)	30	6
307	Manage the payment transaction process in a retail environment (C.16)	43	9
318	Contribute to the continuous improvement of retail operations within own area of responsibility (E.10)	47	10
319	Manage the prevention of wastage and loss in a retail environment (E.11)	50	11
320	Produce staffing schedules to help a retail team to achieve its targets (E.12)	22	5
321	Monitor and maintain health and safety in a retail environment (E.18)	60	13
322	Monitor and support secure payment point use during trading hours (E.21)	13	3
323	Improve the customer relationship (D.06)	47	7
324	Make effective decisions (E.25)	10	3
325	Manage conflict in a team (E.26)	20	3
326	Manage or support equality of opportunity, diversity and inclusion in own area of responsibility (E.27)	20	4

City & Guilds unit	Unit title	GLH	Credit value
327	Monitor and solve customer service problems (D.08)	40	6
328	Organise the delivery of reliable customer service (D.05)	40	6
329	Plan, allocate and monitor work of a team (E.24)	25	5
330	Promote continuous improvement (D.09)	47	7
331	Set objectives and provide support for team members (E.23)	35	5
332	Work with others to improve customer service (D.07)	53	8

To achieve the Level 3 Diploma in Retail Skills (Management), learners must achieve a minimum of **43** credits overall. All **43** credits must be achieved at level 3, of which;

- **10** credits must come from the mandatory unit in group A
- A minimum of **33** credits must come from the level 3 optional units
- A minimum of **18** credits must come from group B
- A maximum of **15** credits can come from the imported units in group C
- A maximum of **8** credits can come from the imported units in group D

City & Guilds unit	Unit title	GLH	Credit value
	Mandatory group		
316	Work effectively and support others in a retail organisation (E.08)	50	10
	Optional		
301	Audit stock levels and stock inventories in a retail environment (B.15)	28	6
302	Source required goods and services in a retail environment (B.16)	52	10
303	Monitor and help improve food safety in a retail environment (B.22)	50	11
304	Manage staff to receive goods in a retail environment (B.37)	24	5
305	Organise and monitor the storage of stock in a retail environment (B.38)	27	6
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307	Manage the payment transaction process in a retail environment (C.16)	43	9
318	Contribute to the continuous improvement of retail operations within own area of responsibility (E.10)	47	10
319	Manage the prevention of wastage and loss in a retail environment (E.11)	50	11
320	Produce staffing schedules to help a retail team to achieve its targets (E.12)	22	5
321	Monitor and maintain health and safety in a retail environment (E.18)	60	13

City & Guilds unit	Unit title	GLH	Credit value
322	Monitor and support secure payment point use during trading hours (E.21)	13	3
323	Improve the customer relationship (D.06)	47	7
324	Make effective decisions (E.25)	10	3
325	Manage conflict in a team (E.26)	20	3
326	Manage or support equality of opportunity, diversity and inclusion in own area of responsibility (E.27)	20	4
327	Monitor and solve customer service problems (D.08)	40	6
328	Organise the delivery of reliable customer service (D.05)	40	6
329	Plan, allocate and monitor work of a team (E.24)	25	5
330	Promote continuous improvement (D.09)	47	7
331	Set objectives and provide support for team members (E.23)	35	5
332	Work with others to improve customer service (D.07)	53	8
334	Motivating colleagues to promote web-based retail facilities to customers (MCR17)	30	4
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3   The assessment process

Simulation is allowed in some of the units in this qualification. Where simulation is needed this must be agreed with your external verifier in advance to ensure validity. Candidates should be assessed under normal workplace conditions. However, there are situations where the actual workplace may not be appropriate, or where waiting for naturally occurring evidence is impractical. See Appendix for list of units where simulation is allowed.

The following people at your centre will explain the assessment process and help you achieve your unit(s).

The assessor/tutor
The assessor/tutor is the person you will have the most contact with as you work towards your unit(s). You may have more than one assessor/tutor depending on which unit(s) you take or you may be assessed by a person who is not your tutor.

The internal verifier
The internal verifier maintains the quality of assessment within the centre.

The external verifier
The external verifier works for City & Guilds and helps to ensure that your centre meets the required standards for quality and assessment.

4 Using your logbook

Recording forms

This logbook contains all of the forms you and your assessor will need to plan, review and organise your evidence. Your assessor will be able to help you decide which forms you need to complete and help you fill them in.

Please photocopy these forms as required.

5   Candidate Record of Achievement

Level 3 Certificate Diploma in Retail Skills (Management) (7384-30/33)

Candidate Name:

Unit Number and Title	Credits	Date Achieved	Assessor Initials	Internal QA Initials if sampled and date	External QA Initials if sampled and date

6   Expert/Witness Status list

Candidate name… … … … … … … … … … … … … … … … … … …..

Name and Witness Signature	Status *	Professional relationship to candidate **	Unit or elements witnessed

* Status

1 Occupational expert meeting specific requirements for role of expert witness

3 Non expert familiar with the standards

2 Occupational expert not familiar with the standards

4 Non expert not familiar with the standards

** Professional relationship to candidate

Manager = M   Supervisor = S   Colleague = Coll   Customer = Cus   Other (please specify)

Unit 260 Using web-based facilities in-store to achieve retail sales (MCR15)

2 credits

Outcome 1 **Be able to operate their own organisation's web-based in-store retail selling facilities in support of their customers' retail experience**

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
1.1 operate all aspects of the organisation's relevant web-based facilities correctly and with confidence						
1.2 use web-based facilities for the benefit of customers, based upon identified customer needs						
1.3 be proactive in checking online the availability of stock sought by customers						
1.4 place orders online on behalf of customers, where relevant						
1.5 process customer payments using web-based facilities, where relevant, applying appropriate discounts, in line with organisational requirements						
1.6 explain their responsibilities for monitoring and maintaining good housekeeping in relation to the web-based retail facilities in-store						
1.7 make sure that the selling of products within their area of operations complies with relevant legislation and regulatory requirements						
1.8 make sure that web-based facilities in-store fulfil relevant housekeeping requirements						
1.9 report any faults with web-based facilities in-store promptly to the relevant person						
Type of evidence ☐						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   Be able to promote customers' use of web-based in-store retail selling facilities

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
2.1 explain the need to be sensitive to customers' attitudes to web-based technology, including how to respond to customers accordingly						
2.2 make customers aware of the availability and scope of their own organisation's web-based facilities						
2.3 communicate the features and benefits of web-based facilities enthusiastically and with confidence						
2.4 respond to customer needs from, and interest in, web-based facilities						
2.5 involve customers in the use of web-based processes where appropriate						
2.6 refer any problems whilst customers are using the web-based facilities in-store to the appropriate person, where necessary						
2.7 seek customer feedback regarding use of their own organisation's web-based facilities in-store						
Type of evidence ☐						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Unit 260   Using web-based facilities in-store to achieve retail sales (MCR15)

Declaration

I confirm that the evidence supplied for the above listed unit is authentic and a true representation of my own work. The work logged is my own work carried out during my normal work duties.

The answers in the question bank are my own work and discussed with my assessor on completion. I have been observed in my workplace by my assessor on several occasions.

Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 261   Advising and supporting customers on the use of in-store web-based retail facilities (MCR16)

3 credits

Outcome 1   Understand factors to consider when advising and supporting customers on the use of in-store web-based retail facilities

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
1.1 explain the importance of achieving a balance between demonstration, instruction and customers' own activity in operating the facilities, as appropriate to customers' levels of expertise, attitude and confidence in using web-based technology						
1.2 explain their own organisation's practices and requirements relating to advising and supporting customers on the use of the web-based facilities.						
Type of evidence ☐						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   Be able to address customers' requirements via in-store web-based retail selling facilities

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
2.1 operate all aspects of their own organisation's web-based facilities correctly and with confidence						
2.2 determine customers' requirements in accessing web-based facilities						
2.3 assess customers' levels of understanding regarding how to use the web-based facilities						
Type of evidence ☐						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3   Be able to promote and support customers' use of in-store web-based retail selling facilities

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
3.1 promote use of the organisation's web-based facilities with enthusiasm, relating their features and benefits to the relevant needs of customers						
3.2 explain the use of the facilities:						
• clearly and correctly						
• in a manner which promotes understanding						
• in a manner which is appropriate to their customers' existing appreciation and attitude to the technology being demonstrated						
3.3 provide opportunities for customers to ask questions, checking for understanding						
3.4 respond to customers' questions in ways that promote sales and goodwill						
3.5 support customers in operating in-store web-based facilities as appropriate to their customers' needs and levels of confidence in the use the web-based facilities						
Type of evidence ☐						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4   Be able to seek and use feedback regarding their own organisation's in-store web-based retail selling facilities

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
4.1 seek feedback from customers upon the experience of using the organisation's web-based facilities						
4.2 respond to customer feedback in ways that promote goodwill						
4.3 report positive comments and any suggested improvements to the relevant person						
Type of evidence ☐						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Unit 261 Advising and supporting customers on the use of in-store web-based retail facilities (MCR16)

Declaration

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Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 301   Audit stock levels and stock inventories in a retail environment (B.15)

6 credits

Outcome 1   Be able to implement a stock audit in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
1.1 explain the importance of auditing levels of stock and stock inventories						
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						
1.3 negotiate with colleagues to obtain staff who have the necessary skills to help with the audit						
1.4 allocate specific responsibilities to each member of the audit team						
1.5 explain to the audit team what they are expected to do						
1.6 diagnose and resolve problems that arise when implementing the audit						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   Be able to use the findings of an audit to identify and resolve problems with stock levels and stock inventories

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
2.1 analyse the findings of a stock audit to identify problems that need resolving						
2.2 prioritise problems according to their importance and urgency						
2.3 investigate and resolve problems:						
• methodically						
• as far as possible within the scope of the audit and with the resources available						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3   Be able to communicate the results of an audit

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
3.1 clarify audit findings, including any unresolved problems, in a timely fashion for those who need the information						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 302   Source required goods and services in a retail environment (B.16)

10 credits

Outcome 1   Understand the role of suppliers when sourcing goods and services

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain how suppliers' terms and conditions can affect the profitability of a retail business		
1.2 explain the organisation's legal rights as a purchaser of goods and services, including rights relating to returns, replacements and refunds		
1.3 explain what constitutes a legally binding contract between retailer and supplier		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2   Be able to source required   goods and services

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 interpret stock records to establish:						
• which stock needs replenishing						
• the quantity of stock required						
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3   Be able to order goods and services

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
3.1 analyse purchase requisitions to identify items that can be ordered together						
3.2 order goods and services:						
• of the required type and quantity						
• allowing sufficient time for delivery						
3.3 develop procedures that will enable colleagues to give sufficient notice of any special orders for goods and services						
3.4 resolve overdue or incomplete orders with the supplier						
3.5 arrange returns, replacements and refunds when applicable						
3.6 explain the options available when orders cannot be fulfilled on time						
3.7 maintain purchasing records that are in line with organisational procedures						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4   Be able to evaluate the performance of suppliers of stock for retail sale

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
4.1 evaluate the quality, price and timeliness of deliveries against the organisation's requirements						
4.2 evaluate colleagues' feedback about suppliers' performance to determine if the standard of performance is acceptable						
4.3 provide feedback to suppliers on the level of service they provide						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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The answers in the question bank are my own work and discussed with my assessor on completion. I have been observed in my workplace by my assessor on several occasions.

Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 303　　Monitor and help improve food safety in a retail environment (B.22)

11 credits

Outcome 1　Understand the principles of food safety management that apply to a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the following terms in relation to own organisation:		
• 'critical control points'		
• 'control points'		
• 'critical limits'		
• 'variance'		
1.2 explain the importance of monitoring critical control points and control points		
1.3 explain the impact of variance at critical control points and control points on food safety, public health and the organisation		
1.4 explain why traceability is important to food safety		
1.5 explain how traceability works		
1.6 explain the importance of having organisational food safety procedures in place		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2　Be able to monitor critical control points in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 select relevant food safety control measures when monitoring critical control points						
2.2 implement all specified organisational operational controls and checks of critical control points at the set time frequency						

2.3 maintain records of monitoring activities in line with organisational procedures						
2.4 obtain verification for completed checks, following organisational procedures						
Type of evidence						

O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report

Outcome 3   Be able to deal with problems identified when monitoring critical control points in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
3.2 report to the designated person any procedures that are out of line with critical limits						
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						
Type of evidence						

O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report

Outcome 4   Be able to ensure that staff perform to the standard required for food safety in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
4.1 allocate food safety responsibilities to staff						
4.2 supervise staff to ensure that allocated food safety responsibilities are met						
4.3 ensure that staff receive the training in food safety that they need						
Type of evidence						

O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report

Outcome 5   Be able to evaluate the nature and impact of factors or issues that may affect the safety of food a in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 6   Be able to contribute to improving food safety in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
6.1 explain the term 'continuous improvement' in relation to food safety						
6.2 explain the importance of contributing to the process of improving food safety						
6.3 present to decision-makers ideas for improving procedures or processes that affect food safety						
6.4 implement new or revised procedures to improve food safety, where authorised to do so						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

I confirm that the evidence supplied for the above listed unit is authentic and a true representation of my own work. The work logged is my own work carried out during my normal work duties.

The answers in the question bank are my own work and discussed with my assessor on completion. I have been observed in my workplace by my assessor on several occasions.

Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 304 Manage staff to receive goods in a retail environment (B.37)

5 credits

Outcome 1 Be able to manage staff to receive and check incoming deliveries of goods in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
1.1 select sufficient staff to prepare for, receive and check expected incoming deliveries of goods						
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						
1.3 assess whether the area for receiving goods has been adequately prepared to ensure safe and secure unloading of goods						
1.4 assess whether there is enough storage space of the right type for the expected goods						
1.5 ensure that goods are unloaded safely and securely						
1.6 explain why incoming goods should be checked against requirements immediately after unloading						
1.7 ensure that incoming goods are checked against requirements immediately after unloading						
1.8 ensure that delivery records are completed in line with organisational procedures						
1.9 evaluate records of deliveries of goods to determine whether each supplier has met the organisation's service needs						
1.10 resolve problems with deliveries of goods in line with organisational procedures						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Unit 304 Manage staff to receive goods in a retail environment (B.37)

Declaration

I confirm that the evidence supplied for the above listed unit is authentic and a true representation of my own work. The work logged is my own work carried out during my normal work duties.

The answers in the question bank are my own work and discussed with my assessor on completion. I have been observed in my workplace by my assessor on several occasions.

Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 305 Organise and monitor the storage of stock in a retail environment (B.38)

6 credits

Outcome 1 Understand the causes and prevention of stock loss within storage systems

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the causes of stock deterioration, loss and damage		
1.2 explain how to reduce stock loss within storage systems		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Understand the legal and organisational requirements for storing stock

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 explain the legal and organisational requirements for storing stock, including health and safety requirements and the removal of out-of-date stock		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to organise the use of storage facilities in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						

Assessment criteria (Performance)						
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						
3.7 monitor storage operations to ensure that staff are storing and moving stock:						
• securely						
• safely						
• in line with relevant legal requirements						
• 3.8 maintain stock records that are in line with organisational procedures						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4   Be able to monitor the storage and care of stock in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
4.1 maintain a routine that meets the organisation's requirements for checking the quality of storage facilities and stock						
4.2 perform spot checks of storage facilities and stock						
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						
4.4 monitor the storage and movement of stock to make sure that stock is reaching the shop floor as it is needed						
4.5 recommend to decision makers ways of running storage and stock movement systems more profitably						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 306 Maintain the availability of goods on display in a retail environment to promote sales (C.13)

6 credits

Outcome 1 Understand how the display of goods can promote sales

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Understand legal and organisational requirements for displaying goods

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3   Be able to organise staff to display goods for retail sale

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
3.4 ensure that staff put the display together:						
• safely						
• with the minimum of inconvenience to customers						
3.5 explain the importance of consulting an authorised decision-maker before modifying or changing the display						
3.6 ensure that the records kept of displays are in line with organisational procedures						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4   Be able to evaluate the effectiveness of displays

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
4.1 evaluate the effectiveness of displays in relation to:						
• their intended purpose						
• legal and organisational requirements and standards						
4.2 evaluate information within displays to ensure that its content and position are:						
• legally compliant						
• likely to promote sales						
4.3 ask staff for suggestions for making the display more appealing to customers						
4.4 explain the importance of dealing promptly with any risks to security or health and safety that arise when evaluating displays						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 5   Be able to maintain the required quantity and quality of goods on display

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
5.1 provide accurate, up-to-date pricing information to the staff who need it						
5.2 monitor price marking to ensure that it is correct						
5.3 resolve any pricing problems that arise						
5.4 develop stock replenishment plans to maintain the required quantity and quality of goods on display						
5.5 organise the removal of stock of unsaleable quality from display						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Assessor Name:	
Assessor Signature:	
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IV Name:	
IV Signature:	
Date:	

Unit 307 Manage the payment transaction process in a retail environment (C.16)

9 credits

Outcome 1 **Be able to monitor payment transaction processing in a retail environment**

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
1.1 explain the aims that takings practices and procedures are designed to achieve						
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						
1.3 perform checks to ensure that equipment is providing information concerning payment transactions that is:						
• up to date						
• accurate						
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   Be able to manage the operation of payment points in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
2.1 performs checks to ensure that staff set up and operate payment points in line with organisational procedures						
2.2 resolve any operational problems with payment points when within own authority to do so						
2.3 monitor the way that payments are handled, ensuring that staff are following organisational procedures						
2.4 develop contingency plans to deal with unexpected problems at payment points						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 316 Work effectively and support others in a retail organisation (E.08)

10 credits

Outcome 1 Understand how own team contributes to the success of the wider organisation

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain own team's purpose, aims and targets in the context of the wider organisation		
1.2 explain the roles and responsibilities of colleagues in own team		
1.3 explain the importance of good working relations within own team		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Understand own role within a team in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 explain own responsibility for contributing to own team's success, including helping colleagues to learn		
2.2 explain the importance of being a reliable team member		
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		
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		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3   Understand what motivates self and colleagues in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
3.2 explain potential circumstances that could affect morale in a retail environment		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 4   Be able to support effective working within a retail team

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
4.1 allocate work in ways that take account of own and colleagues' preferences, skills and available time						
4.2 make and keep commitments to colleagues within:						
• own team						
• the wider organisation						
4.3 agree alternative actions when it is not possible to keep commitments made to colleagues						
4.4 interact with colleagues within own team and wider organisation in ways that attempt to maintain morale						
4.5 explain to team members why it is important to treat each other fairly, politely and with respect						
4.6 implement own organisation's health and safety procedures while working						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 5   Be able to improve own work performance in own retail team

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
5.1 identify knowledge and skills needed to improve own work performance						
5.2 reach agreement with own line manager concerning:						
• learning and development goals						
• action points and deadlines for own learning and development						
5.3 take measures to improve own performance						
5.4 review own progress against an agreed learning and development plan, including seeking feedback from those in a position to give it						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 6   Be able to help others to learn in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
6.1 communicate to colleagues own willingness and availability to provide work-related information and advice						
6.2 provide information and advice on request to colleagues where this is within own responsibility						
6.3 provide advice and support to colleagues to help them meet the organisation's standards						
6.4 communicate procedures to colleagues in a logical sequence to help them meet the organisation's standards						
6.5 provide colleagues with opportunities to practise new skills						
6.6 provide constructive feedback to colleagues on their progress in developing new skills						
6.7 ensure that health, safety and security are not compromised when helping others to learn						
6.8 refer colleagues to specialist advice as needed to support their learning						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Unit 316 — Work effectively and support others in a retail organisation (E.08)

Declaration

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Date:	

IV Name:	
IV Signature:	
Date:	

Unit 318   Contribute to the continuous improvement of retail operations within own area of responsibility (E.10)

10 credits

Outcome 1   Understand how own area of responsibility can contribute to the overall success of the retail organisation

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain characteristics of the organisation's brand image, customer base and desired market position		
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		
1.3 explain how systems and procedures in own area of responsibility are intended to support the achievement of organisational performance measures		
1.4 explain potential causes of failure to achieve organisational performance measures in the type of retail operations carried out in own area of responsibility		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2   Understand how to motivate staff in own area of responsibility to support and contribute to the continuous improvement of retail operations

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 explain why it is important for staff to understand the purpose and intended benefits of improvements to retail operations		
2.2 explain how own manner when explaining improvements can affect staff's response to these		
2.3 explain the importance of encouraging staff to suggest ideas for improvement to retail operations		
2.4 explain the importance of ensuring that colleagues receive the credit if their ideas are implemented		
2.5 explain the importance of showing enthusiasm and leading by example when putting improvements into practice		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to evaluate achievements of organisational performance measures for retail operations within own area of responsibility

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
3.1 evaluate organisational performance within own area of responsibility using information that is :						
• relevant						
• reliable						
• up to date						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4 Be able to develop recommendations for improving the effectiveness of retail operations

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 5   Be able to recommend ideas for improving the effectiveness of retail operations to decision makers

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
5.1 present ideas to decision makers for possible improvements, doing so:						
• with supporting facts						
• acknowledging 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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 6   Be able to contribute to the implementation of planned improvements to retail operations within own area of responsibility

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
6.1 explain planned improvements to staff in ways that attempt to:						
• make clear the benefits of the proposed changes						
• encourage involvement in implementing proposed changes						
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Unit 318   Contribute to the continuous improvement of retail operations within own area of responsibility (E.10)

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IV Signature:	
Date:	

Unit 319   Manage the prevention of wastage and loss in a retail environment (E.11)

11 credits

Outcome 1   Understand the purpose of loss-control and stock-taking systems

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the purpose of loss-control and stock taking systems		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2   Be able to monitor own work area security in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 monitor the work area to detect any problems with security						
2.2 implement security measures in line with:						
• legislation						
• organisational requirements						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3   Be able to promote security consciousness to colleagues

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4   Be able to investigate loss of stock, equipment, cash and cash equivalents

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 5   Be able to take measures to prevent wastage and loss

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
5.2 evaluate potential methods for preventing wastage and loss						
5.3 implement methods to prevent wastage and loss						
5.4 evaluate the effectiveness of wastage and loss prevention measures						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

City&
Guilds

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IV Name:	
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Unit 320   Produce staffing schedules to help a retail team to achieve its targets (E.12)

5 credits

Outcome 1   **Understand the uses of and constraints upon the staffing schedules for a retail team**

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the relationship between staffing schedules and the achievement of work targets within a retail team		
1.2 explain the factors other than staffing that may affect progress towards work targets, and the effect these are likely to have		
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		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2   **Be able to produce staffing schedules for a retail team**

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3 Be able to adjust staffing schedules to take account of changing operational needs and constraints

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Date:	

IV Name:	
IV Signature:	
Date:	

Unit 321   Monitor and maintain health and safety in a retail environment (E.18)

13 credits

Outcome 1   Understand own role in controlling risks to health and safety in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
1.2 describe sources of information and advice about health and safety legislation, policy and procedures		
1.3 explain how to control health and safety hazards in relation to own role		
1.4 describe methods of containing threatening and/or violent behaviour		
1.5 explain how to control threatening and/or violent behaviour		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2   Understand own responsibility for implementing accident and emergency procedures in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 explain how people can react in the event of accidents and emergencies		
2.2 explain the importance of staying calm in the event of an accident or emergency		
2.3 describe organisational procedures for raising alarms		
2.4 explain own responsibilities in relation to evacuating the workplace in the event of an accident or emergency		
2.5 describe escape routes from own work place including how to reach and use them safely		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3   Be able to control risks to health and safety in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
3.2 seek advice immediately from the designated person when having difficulty controlling a risk to health and safety						
3.3 provide training to colleagues on safe working practices						
3.4 implement health and safety checks in line with organisational procedures						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4   Be able to conduct risk assessments in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
4.1 explain why risk assessments are necessary in a retail environment						
4.2 conduct risk assessments in such a way as to detect any significant risks to health and safety						
4.3 prioritise risks in the order they should be dealt with						
4.4 record risk assessments in line with organisational procedures						
4.5 make risk assessment records available to those who need them						
4.6 review risk assessment procedures to take account of changes in factors affecting health and safety						
4.7 update risk assessment procedures as needed						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 5 Be able to implement accident and emergency procedures in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
5.1 take action in line with organisational procedures to prevent injury when emergencies occur in the workplace						
5.2 take action in line with organisational procedures to prevent damage to property when emergencies occur in the workplace						
5.3 take action in line with organisational procedures to contain potentially unsafe situations in the work area						
5.4 seek immediate help from an appropriate source in the event of accidents and emergencies						
5.5 use safety equipment in the event of an accident or emergency in line with the organisation's and/or manufacturer's guidelines						
5.6 ensure when the building is being evacuated that:						
• 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						
5.7 act immediately to isolate anyone acting violently or making threats						
5.8 take action to protect colleagues and customers from anyone acting violently or making threats						
Type of evidence						
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Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 322 Monitor and support secure payment point use during trading hours (E.21)

3 credits

Outcome 1 Understand the data security risks associated with payment point use

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to monitor and support secure payment point use during trading hours

Assessment criteria (Performance)	Evidence date						
The learner can:	Portfolio reference						
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							
Type of evidence							
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report							

Unit 322   Monitor and support secure payment point use during trading hours (E.21)

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 323   Improve the customer relationship (D.06)
7 credits

Outcome 1   improve communication with their customers

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
1.1 select and use the best method of communication to meet their customers' expectations						
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						
1.3 adapt their communication to respond to individual customers' feelings						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   balance the needs of their customer and their organisation

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
2.1 meet their customers' expectations within their organisation's service offer						
2.2 explain the reasons to their customers sensitively and positively when customer expectations cannot be met						
2.3 identify alternative solutions for their customers either within or outside the organisation						
2.4 identify the costs and benefits of these solutions to their organisation and to their customers						
2.5 negotiate and agree solutions with their customers which satisfy them and are acceptable to their organisation						
2.6 take action to satisfy their customers with the agreed solution when balancing customer needs with those of their organisation						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3   exceed customer expectations to develop the relationship

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
3.1 make extra efforts to improve their relationship with their customers						
3.2 recognise opportunities to exceed their customers' expectations						
3.3 take action to exceed their customers' expectations within the limits of their own authority						
3.4 gain the help and support of others to exceed their customers' expectations						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4   understand how to improve the customer relationship

Assessment criteria (Knowledge) **The learner can:**	Portfolio reference	
4.1 describe how to make best use of the method of communication chosen for dealing with their customers		
4.2 explain how to negotiate effectively with their customers		
4.3 explain how to assess the costs and benefits to their customers and their organisation of any unusual agreement they make		
4.4 explain the importance of customer loyalty and/or improved internal customer relationships to their organisation		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Unit 323 Improve the customer relationship (D.06)

Declaration

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Date:	

IV Name:	
IV Signature:	
Date:	

Unit 324   Make effective decisions (E.25)
3 credits

Outcome 1   Be able to identify circumstances that require a decision to be made

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   Be able to collect information to inform decision-making

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3   Be able to analyse information to inform decision-making

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
3.1 identify information for validity and relevance to the decision-making process						
3.2 analyse information and against established criteria						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4   Be able to make a decision

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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IV Signature:	
Date:	

Unit 325   Make effective decisions (E.25)
3 credits

Outcome 1   Be able to support team members' understanding of their role and position within a team

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   Be able to take measures to minimise conflict within a team

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3   Be able to understand how to encourage team members to resolve their own conflicts

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4   Be able to understand legal and organisational requirements concerning conflict

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Date:	

IV Name:	
IV Signature:	
Date:	

Unit 326 Manage or support equality of opportunity, diversity and inclusion in own area of responsibility (E.27)

4 credits

Outcome 1 Understand own responsibilities under equality legislation, relevant codes of practice and own organisational policies

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain how equality of opportunity		
1.2 describe how equality of opportunity		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to communicate an organisation's written equality, diversity and inclusion policy and procedures in own area of responsibility

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 outline an organisation's equality, diversity and inclusion policy and procedures						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3   Be able to monitor equality, diversity and inclusion within own area of responsibility

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
3.1 monitor how equality, diversity and inclusion activities in own area of responsibility are in line with own organisation						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 327   Monitor and solve customer service problems (D.08)

6 credits

Outcome 1   solve immediate customer service problems

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
1.1 respond positively to customer service problems following organisational guidelines						
1.2 solve customer service problems when they have sufficient authority						
1.3 work with others to solve customer service problems						
1.4 keep customers informed of the actions being taken						
1.5 check with customers that they are comfortable with the actions being taken						
1.6 solve problems with service systems and procedures that might affect customers before customers become aware of them						
1.7 inform managers and colleagues of the steps taken to solve specific problems						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   identify repeated customer service problems and options for solving them

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
2.1 identify repeated customer service problems						
2.2 identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option						

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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3 take action to avoid the repetition of customer service problems

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
3.2 action their agreed solution						
3.3 keep their customers informed in a positive and clear manner of steps being taken to solve any service problems						
3.4 monitor the changes they have made and adjust them if appropriate						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4 understand how to monitor and solve customer service problems

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
4.1 describe organisational procedures and systems for dealing with customer service problems		
4.2 describe the organisational procedures and systems for identifying repeated customer service problems		
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		
4.4 explain how to negotiate with and reassure customers while their problems are being solved		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

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Date:	

IV Name:	
IV Signature:	
Date:	

Unit 328   Organise the delivery of reliable customer service (D.05)

6 credits

Outcome 1   plan and organise the delivery of reliable customer service

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
1.1 plan, prepare and organise everything they need to deliver services or products to different types of customers						
1.2 organise what they do to ensure that they are consistently able to give prompt attention to your customers						
1.3 reorganise their work to respond to unexpected additional workloads						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   review and maintain customer service delivery

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
2.1 maintain service delivery during very busy periods and unusually quiet periods						
2.2 maintain service delivery when systems, people or resources have let them down						
2.3 consistently meet their customers' expectations						
2.4 balance the time they take with their customers with the demands of other customers seeking their attention						

2.5 respond appropriately to their customers when customers make comments about the products or services they are offering						
2.6 alert others to repeated comments made by their customers						
2.7 take action to improve the reliability of their service based on customer comments						
2.8 monitor the action they have taken to identify improvements in the service they give to their customers						
Type of evidence						

O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report

Outcome 3   use recording systems to maintain reliable customer service

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
3.1 record and store customer service information accurately following organisational guidelines						
3.2 select and retrieve customer service information that is relevant, sufficient and in an appropriate format						
3.3 quickly locate information that will help solve a customer's query						
3.4 supply accurate customer service information to others using the most appropriate method of communication						
Type of evidence						

O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report

Outcome 4 understand how to organise the delivery of reliable customer service

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
4.1 describe organisational procedures for unexpected situations and their role within them		
4.2 describe resource implications in times of staff sickness and holiday periods and their responsibility at these times		
4.3 explain the importance of having reliable and fast information for their customers and their organisation		
4.4 evaluate the organisational procedures and systems for delivering customer service		
4.5 identify useful customer feedback and explain how to decide which feedback should be acted on		
4.6 describe how to communicate feedback from customers to others		
4.7 evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information		
4.8 explain the legal and regulatory requirements regarding the storage of data		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

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Date:	

IV Name:	
IV Signature:	
Date:	

Unit 329 Plan, allocate and monitor work of a team (E.24)

5 credits

Outcome 1 Be able to plan work for a team

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2 Be able to allocate work across a team

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3   Be able to manage team members to achieve team objectives

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
3.1 support all team members in order to achieve team objectives						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4   Be able to monitor and evaluate the performance of team members

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 5   Be able to improve the performance of a team

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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IV Name:	
IV Signature:	
Date:	

Unit 330   Promote continuous improvement (D.09)
7 credits

Outcome 1   plan improvements in customer service based on customer feedback

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
1.1 gather feedback from customers that will help to identify opportunities for customer service improvement						
1.2 analyse and interpret feedback to identify opportunities for customer service improvements and propose changes						
1.3 discuss with others the potential effects of any proposed changes for their customers and their organisation						
1.4 negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   implement changes in customer service

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
2.1 organise the implementation of authorised changes						
2.2 implement the changes following organisational guidelines						
2.3 inform people inside and outside their organisation who need to know of the changes being made and the reasons for them						
2.4 monitor early reactions to changes and make appropriate fine-tuning adjustments						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3   review changes to promote continuous improvement

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
3.1 collect and record feedback on the effects of changes						
3.2 analyse and interpret feedback and share their findings on the effects of changes with others						
3.3 summarise the advantages and disadvantages of the changes						
3.4 use their analysis and interpretation of changes to identify opportunities for further improvement						
3.5 present these opportunities to somebody with sufficient authority to make them happen						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4   understand how to promote continuous improvement

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
4.1 review how service improvements in their area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements		
4.2 explain how customer experience is influenced by the way service is delivered		
4.3 explain how to collect, analyse and present customer feedback		
4.4 explain how to make a business case to others to bring about change in the products or services they offer		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Unit 330   Promote continuous improvement (D.09)

Declaration

City & Guilds

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Unit 331   Set objectives and provide support for team members (E.23)

5 credits

Outcome 1   Be able to communicate a team's purpose and objectives to the team members

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   Be able to develop a plan with team members showing how team objectives will be met

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3 Be able to support team members identifying opportunities and providing support

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4 Be able to monitor and evaluate progress and recognise individual and team achievement

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
4.1 monitor and evaluate individual and team activities and progress						
4.2 provide recognition when individual and team objectives have been achieved						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Date:	

Unit 332   Work with others to improve customer service (D.07)

8 credits

Outcome 1   improve customer service by working with others

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2   monitor their own performance when improving customer service

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3 monitor team performance when improving customer service

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
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						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4 understand how to work with others to improve customer service

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
4.3 describe the roles of others outside their organisation who have an impact on their services or products		
4.4 evaluate what the goals or targets of their organisation are in relation to customer service and how these are set		
4.5 evaluate how their organisation identifies improvements in customer service		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

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Date:	

Unit 334   Motivating colleagues to promote web-based retail facilities to customers (MCR17)

4 credits

Outcome 1   Understand the factors to consider when motivating colleagues to promote web-based retail facilities to customers

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the main reasons why some colleagues may be concerned about the development and availability of web-based facilities in-store		
1.2 describe how to address the concerns of colleagues in relation to web-based retail facilities		
1.3 explain with whom in their own organisation it is appropriate to discuss activities designed to overcome colleagues' concerns regarding the use of web-based activities in-store		
1.4 explain different learning styles and how these can impact on how colleagues learn and develop skills in using web-based technology		
1.5 explain the importance of demonstrating respect for colleagues when helping them to use web-based technology		
1.6 describe how respect for colleagues can be demonstrated when helping them in the use of web-based technology		
Type of evidence ☐		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2   Be able to promote colleagues' use of in-store web-based retail selling facilities

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
2.1 Explain to colleagues the purpose of all aspects of their own organisation's relevant web-based facilities and the benefits for customers						
2.2 Describe to colleagues the value of the facilities to their own organisation, including the opportunities that they present for engaging with customers in-store						
2.3 Support colleagues in the use of the web-based facilities						

2.4 Communicate with colleagues in a manner which promotes understanding and which demonstrates respect							
2.5 Make sure that colleagues' achievements in the use of web-based facilities are recognised							
Type of evidence ☐							
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report							

Outcome 3   Be able to address barriers to their colleagues' use of in-store web-based retail selling facilities

Assessment criteria (Performance)	Evidence date					
The learner can:	**Portfolio reference**					
3.1 Determine the learning needs of colleagues relating to the use of their own organisation's web-based retail facilities, in line with their level of responsibility and organisational procedures						
3.2 Address identified learning needs in line with organisational procedures						
3.3 Identify positive and negative attitudes, where relevant, amongst colleagues regarding the web-based facilities						
3.4 Identify any barriers and conflicts that may impact negatively upon colleagues' attitudes to the use of the web-based facilities						
3.5 Discuss the needs of colleagues relating to the use of the web-based facilities with relevant people in their own organisation, protecting individual confidentiality where necessary						
3.6 Recommend activities designed to promote positive attitudes towards and use of web-based facilities						
3.7 Make sure that they act within their own levels of authority and expertise						
Type of evidence ☐						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Candidate Signature:	
Date:	

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Appendix 1 Units for which simulated activities are allowed

This list includes only Skillsmart Retail's units. For guidance on assessing imported units, please refer to the relevant sector's own assessment principles.

Unit number	Unit title	UAN
101	Move goods and materials manually in a retail environment (B.01)	F/503/5656
102	Keep stock at required levels in a retail environment (B.02)	J/503/5657
106	Wrap and pack goods for customers in a retail environment (C.01)	K/503/5683
108	Recognise and report security risks in a retail environment (E.01)	F/503/5723
109	Comply with workplace health and safety requirements in a retail environment (E.02)	J/503/5724
110	Work effectively in a retail team (E.03)	L/503/5725
111	Keep the non-food retail environment clean and tidy (E.04)	R/503/5726
210	Organise own work to meet a dough production schedule in a retail environment (B.17)	A/503/5672
245	Protect own and others' health and safety when working in a retail environment (E.06)	Y/503/5727
246	Reduce security risks in a retail environment (E.07)	D/503/5728
319	Manage the prevention of wastage and loss in a retail environment (E.11)	H/503/5732
321	Monitor and maintain health and safety in a retail environment (E.18)	M/503/5734

Appendix 2   Units from which expert witness testimony is allowed if the assessor is not expert

Retail Skills units for which expert witness testimony is allowed if the assessor is not expert in the specialism covered by the unit. This list includes only Skillsmart Retail's units. For guidance on assessing imported units, please refer to the relevant sector's own assessment principles.

Unit number	Unit title	UAN
104	Maintain food safety while working with food in a retail environment (B.20)	F/503/5673
207	Hand-process fish in a retail environment (B.11)	K/503/5666
208	Process greengrocery products for sale in a retail environment (B.12)	M/503/5667
209	Finish meat products by hand in a retail environment (B.13)	T/503/5668
210	Organise own work to meet a dough production schedule in a retail environment (B.17)	A/503/5672
211	Maintain food safety while working with food in a retail environment (B.21)	J/503/5674
214	Finish bake-off food products in a retail environment (B.35)	H/503/5679
215	Glaze, coat or decorate bake-off products for sale in a retail environment (B.36)	Y/503/5680
222	Process applications for credit agreements offered in a retail environment (C.09)	F/503/5690
223	Promote loyalty schemes to customers in a retail environment (C.12)	J/503/5691
224	Provide a bra fitting service in a retail environment (C.17)	Y/503/5694
225	Follow guidelines for planning and preparing visual merchandising displays (C.18)	D/503/5695
226	Dress visual merchandising displays to attract customers (C.19)	H/503/5696
227	Order and position signage and graphics for visual merchandising displays (C.20)	K/503/5697
228	Dismantle and store props and graphics from visual merchandising displays (C.21)	M/503/5698
229	Make props and decorate fixtures and panels for visual merchandising displays (C.22)	T/503/5699
230	Assemble visual merchandising displays (C.23)	D/503/5700
232	Provide National Lottery products to customers (C.37)	L/503/5708
233	Advise customers on the fixing and care of tiles (C.42)	R/503/5709

Unit number	Unit title	UAN
235	Promote a retail store's credit card to customers in a retail environment (C.47)	R/503/5712
239	Help customers to apply for a retail store's credit card and associated insurance products (C.52)	M/503/5717
240	Help customers to choose delicatessen products in a retail environment (C.54)	T/503/5718
241	Portion delicatessen products to meet customer requirements in a retail environment (C.55)	A/503/5719
243	Demonstrate make-up and skincare products to customers at a beauty counter in a retail environment (C.59)	T/503/5721
244	Operate a customer record card system on a beauty counter in a retail environment (C.60)	A/503/5722
303	Monitor and help improve food safety in a retail environment (B.22)	L/503/5675
308	Choose merchandise to feature in visual merchandising displays (C.24)	H/503/5701
309	Manage the use of signage and graphics in visual merchandising displays (C.25)	K/503/5702
310	Evaluate the effectiveness of visual merchandising displays (C.26)	M/503/5703
311	Manage budgets for visual merchandising projects (C.27)	T/503/5704
312	Contribute to improving a retail organisation's visual merchandising policy (C.28)	A/503/5705
313	Design visual merchandising display layouts (C.29)	F/503/5706
314	Help customers to choose alcoholic beverages in a retail environment (C.45)	J/503/5710
320	Produce staffing schedules to help a retail team to achieve its targets (E.12)	K/503/5733

Appendix 3   Skillscan

		Activities undertaken – do you	often	Sometimes	Never	Comments/Action
301	B.15	Audit stock levels and stock inventories in a retail environment				
302	B.16	Source required goods and services in a retail environment				
303	B.22	Monitor and help improve food safety in a retail environment				
304	B.37	Manage staff to receive goods in a retail environment				
305	B.38	Organise and monitor the storage of stock in a retail environment				
306	C.13	Maintain the availability of goods on display in a retail environment to promote sales				
307	C.16	Manage the payment transaction process in a retail environment				
316	E.08	Work effectively and support others in a retail organisation				
318	E.10	Contribute to the continuous improvement of retail operations within own area of responsibility				
319	E.11	Manage the prevention of wastage and loss in a retail environment				
320	E.12	Produce staffing schedules to help a retail team to achieve its targets				
321	E.18	Monitor and maintain health and safety in a retail environment				
322	E.21	Monitor and support secure payment point use during trading hours				
323	D.06	Improve the customer relationship				
324	E.25	Make effective decisions				
325	E.26	Manage conflict in a team				
326	E.27	Manage or support equality of opportunity, diversity and inclusion in own area of responsibility				
327	D.08	Monitor and solve customer service problems				
328	D.05	Organise the delivery of reliable customer service				
329	E.24	Plan, allocate and monitor work of a team				
330	D.09	Promote continuous improvement				
331	E.23	Set objectives and provide support for team members				
332	D.07	Work with others to improve customer service				

Assessment Site …..........

Candidate Signature… … … … … … … … … … Candidate Name (Print)… … … … … … … …...............

Assessor Signature… … … … … … … … … … … … … … … … Date … … … ....… … … … … … … …

Appendix 4   Summary of City & Guilds assessment policies

Health and Safety

All centres have to make sure that they provide a safe and healthy environment for learning, including induction and assessment. City & Guilds external verifiers check this when they visit assessment centres.

Equal Opportunities

Your centre will have an equal opportunities policy. Your centre will explain this to you during your induction, and may give you a copy of the policy.

City & Guilds equal opportunities policy is available from our website **www.cityandguilds.com**, City & Guilds Customer Relations Team or your centre.

Access to assessment

City & Guilds qualifications are open to all candidates, whatever their gender, race, creed, age or special needs. Some candidates may need extra help with their assessment, for example, a person with a visual impairment may need a reader.

If you think you will need alternative assessment arrangements because you have special needs, you should discuss this with your centre during your induction, and record this on your assessment plan. City & Guilds will allow centres to make alternative arrangements for you if you are eligible and if the qualification allows for this. This must be agreed before you start your qualification.

City & Guilds guidance and regulations document *Access to assessment and qualifications* is available on the City & Guilds website **www.cityandguilds.com**, from the City & Guilds Customer Relations Team or your centre.

Complaints and appeals

Centres must have a policy and procedure to deal with any complaints you may have. You may feel you have not been assessed fairly, or may want to appeal against an assessment decision if you do not agree with your assessor.

These procedures will be explained during induction and you will be provided with information about the Quality Assurance Co-ordinator within your centre who is responsible for this.

Most complaints and appeals can be resolved within the centre, but if you follow the centre procedure and are still not satisfied you can complain to City & Guilds.

Our complaints policy is on our website **www.cityandguilds.com** or is available from the City & Guilds Customer Relations Team or your centre.

Useful contacts

UK learners General qualification information	T: +44 (0)844 543 0033 E: **learnersupport@cityandguilds.com**
International learners General qualification information	T: +44 (0)844 543 0033 F: +44 (0)20 7294 2413 E: **intcg@cityandguilds.com**
Centres Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **centresupport@cityandguilds.com**
Single subject qualifications Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: **singlesubjects@cityandguilds.com**
International awards Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **intops@cityandguilds.com**
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **walledgarden@cityandguilds.com**
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: **business@cityandguilds.com**
Publications Logbooks, Centre documents, Forms, Free literature	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: **feedbackandcomplaints@cityandguilds.com**

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