



		Curriculum Document			
Curriculum Code		Curriculum Title		Logo	
522301001		Retail Sales Advisor			
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## **SECTION 1: CURRICULUM SUMMARY**

### **1. Occupational Information**

#### **1.1 Associated Occupation**

522301: Sales Assistant (General)

#### **1.2 Occupation or Specialisation Addressed by this Curriculum**

522301001: Retail Sales Advisor

#### **1.3 Alternative Titles used by Industry**

- Clothing Sales Assistant
- Cosmetic Sales Assistant
- Counterhand
- Hardware Sales Assistant
- Retail Assistant
- Sales Person / Consultant
- Shop Assistant
- Supermarket Assistant / Worker
- Swimming Pool Salesperson
- Telephone Salesperson
- Sales Advisor
- Sales Attendant
- Sales Associate

## **2. Curriculum Information**

### **2.1 Curriculum Structure**

This qualification is made up of the following compulsory Knowledge and Practical Skill Modules:

Knowledge Modules:

- 522301001-KM-01, Principles of attending to different types of customers and resolving customer queries impacting on sales, NQF Level 2, Credits 4
- 522301001-KM-02, Principles of service excellence and building customer relationships in retail and wholesale sales, NQF Level 3, Credits 3
- 522301001-KM-03, Concepts and principles of selling in a full service retail and wholesale environment, NQF Level 3, Credits 4

Total number of credits for Knowledge Modules: 11

Practical Skill Modules:

- 522301001-PM-01, Interact with different types of customers and present a positive image, NQF Level 2, Credits 2
- 522301001-PM-02, Handle customer queries and complaints, NQF Level 2, Credits 2
- 522301001-PM-03, Provide customer service and build customer relationships, NQF Level 3, Credits 2
- 522301001-PM-04, Sell products to customers using the sales cycle, NQF Level 3, Credits 3
- 522301001-PM-05, Use advanced selling techniques, NQF Level 3, Credits 2

Total number of credits for Practical Skill Modules: 11

This qualification also requires the following Work Experience Modules:

- 522301001-WM-01, Processes and procedures for attending to different types of customers, handling customer queries and communicating with customers, NQF Level 2, Credits 10
- 522301001-WM-02, Processes and procedures for providing customer service, NQF Level 3, Credits 8
- 522301001-WM-03, Processes and procedures for selling products to customers using the sales cycle and advanced selling techniques in a full service wholesale or retail sales environment, NQF Level 03, Credits 14

Total number of credits for Work Experience Modules: 32

## 2.2 Entry Requirements

NQF Level 1 with Mathematics and Communication

## 3. Assessment Quality Partner Information

Name of body: Wholesale and Retail SETA

Address of body: Hennops House, 1303 Heuwel Avenue, (Corner Lenchen South and Heuwel) Centurion, Pretoria, 0157

Contact person name: Inger Marrian

Contact person work telephone number: 012 622 9500

## 4. Part Qualification Curriculum Structure

### Part Qualification 1:

#### Title:

Customer service assistant, NQF Level 3, Credits 31

#### Purpose:

The purpose of this part qualification is to prepare a learner to operate as a customer Sales Assistant by attending to customers, resolves queries, providing customer service and builds customer relationships in a retail or wholesale environment.

#### Applicable Modules (Rules of Combination)

Knowledge Modules:

- 522301001-KM-01, Principles of attending to different types of customers and resolving customer queries impacting on sales, NQF Level 2, Credits 4
- 522301001-KM-02, Principles of service excellence and building customer relationships in retail and wholesale sales, NQF Level 3, Credits 3

Total number of credits for Knowledge Modules: 7

Practical Skill Modules:

- 522301001-PM-01, Interact with different types of customers and present a positive image, NQF Level 2, Credits 2
- 522301001-PM-02, Handle customer queries and complaints, NQF Level 2, Credits 2
- 522301001-PM-03, Provide customer service and build customer relationships, NQF Level 3, Credits 2

Total number of credits for Practical Skill Modules: 6

This qualification also requires the following Work Experience Modules:

- 522301001-WM-01, Processes and procedures for attending to different types of customers, handling customer queries and communicating with customers, NQF Level 2, Credits 10
- 522301001-WM-02, Processes and procedures for providing customer service, NQF Level 3, Credits 8

Total number of credits for Work Experience Modules: 18

Assessment Qualification Standards:

- Attend to customers and handle their queries. (25%)
- Build relationships with customers by providing quality service. (25%)

## **SECTION 2: OCCUPATIONAL PROFILE**

### **1. Occupational Purpose**

A Sales Assistant sells goods and services such as fast moving consumer goods (FMCG), clothing, furniture and specialty merchandise in a retail or wholesale environment.

### **2. Occupational Tasks**

- Attend to different types of customers and resolve queries. (NQF Level 2)
- Provide customer service and build customer relationships. (NQF Level 3)
- Sell products in a full service retail and wholesale sales environment. (NQF Level 3)

### **3. Occupational Task Details**

#### **3.1. Attend to different types of customers and resolve queries (NQF Level 2)**

##### **Unique Product or Service:**

- Attended customers and resolved queries.

##### **Occupational Responsibilities:**

- Interact with different types of customers and present a positive image.
- Handle customer queries and complaints.

##### **Occupational Contexts:**

- Processes and procedures for attending to different types of customers, handling customer queries and communicating with customers.

#### **3.2. Provide customer service and build customer relationships (NQF Level 3)**

##### **Unique Product or Service:**

- Optimised customer relationships.

##### **Occupational Responsibilities:**

- Provide customer service and build customer relationships.

##### **Occupational Contexts:**

- Processes and procedures for providing customer service.

#### **3.3. Sell products in a full service retail and wholesale sales environment (NQF Level 3)**

##### **Unique Product or Service:**

- Sales targets met or exceeded.

##### **Occupational Responsibilities:**

- Sell products to customers using the sales cycle.
- Use advanced selling techniques.

**Occupational Contexts:**

- Processes and procedures for selling products to customers using the sales cycle and advanced selling techniques in a full service wholesale or retail sales environment.



## **SECTION 3: CURRICULUM COMPONENT SPECIFICATIONS**

### **SECTION 3A: KNOWLEDGE MODULE SPECIFICATIONS**

List of Knowledge Modules for which Specifications are included

- 522301001-KM-01, Principles of attending to different types of customers and resolving customer queries impacting on sales, NQF Level 2, Credits 4
- 522301001-KM-02, Principles of service excellence and building customer relationships in retail and wholesale sales, NQF Level 3, Credits 3
- 522301001-KM-03, Concepts and principles of selling in a full service retail and wholesale environment, NQF Level 3, Credits 4

## **1. 522301001-KM-01: Principles of attending to different types of customers and resolving customer queries impacting on sales, NQF Level 2, Credits 4**

### **1.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of attending to different types of customers and resolving customer queries in a wholesale or retail sales environment.

The learning will enable learners to demonstrate an understanding of:

- KM-01-KT01: Principles of interacting with different types of wholesale and retail customers (20%)
- KM-01-KT02: Creating a positive image in a sales environment (20%)
- KM-01-KT03: Communicating with wholesale and retail customers (25%)
- KM-01-KT04: The concept and importance of resolving customer queries (20%)
- KM-01-KT05: Handling customer complaints (15%)

### **1.2 Guidelines for Topics**

#### **1.2.1. KM-01-KT01: Principles of interacting with different types of wholesale and retail customers (20%)**

***Topic elements to be covered include:***

- KT0101 The different types of customers encountered in a retail outlet (confident customer, detailed customers, indecisive, big picture, in a hurry)
- KT0102 Generally accepted ways of acknowledging different types of customers (high response and low response customers)
- KT0103 The impact of interacting with and greeting diverse customers professionally
- KT0104 Principles and benefits of acknowledging unattended customers

***Internal Assessment Criteria and Weight***

- IAC0101 List and explain the different types of customers encountered in a wholesale or retail environment
- IAC0102 Explain the generally accepted ways of acknowledging different types customers
- IAC0103 Describe the impact of approaching and greeting diverse customers professionally
- IAC0104 Explain the principles of acknowledging unattended customers
- IAC0105 Explain the benefits of acknowledging unattended customers

***(Weight 20%)***

#### **1.2.2. KM-01-KT02: Creating a positive image in a sales environment (20%)**

***Topic elements to be covered include:***

- KT0201 Principles and effects of first impressions in a sales environment

- KT0202 The effect of personal appearance and grooming in presenting a positive image to customers
- KT0203 The importance and impact of housekeeping on the sales environment
- KT0204 The role of the sales assistant in general housekeeping of a retail or wholesale outlet

***Internal Assessment Criteria and Weight***

- IAC0201 Explain the principles and effects of first impressions in a sales environment
- IAC0202 Describe the effect that personal appearance and grooming has in presenting a positive image to customers in a sales environment
- IAC0203 Explain the importance and impact of housekeeping on the sales environment using examples
- IAC0204 Explain the role of the sales assistant in general housekeeping of a retail or wholesale outlet

***(Weight 20%)***

**1.2.3. KM-01-KT03: Communicating with wholesale and retail customers (25%)**

***Topic elements to be covered include:***

- KT0301 The concept of personal zone awareness and professional language when interacting with customers
- KT0302 Principles of verbal and non-verbal communication in retail and wholesale sales
- KT0303 The importance of listening skills when communicating with customers
- KT0304 Principles of telephone etiquette in retail

***Internal Assessment Criteria and Weight***

- IAC0301 Explain the concept of personal zone awareness and how this impacts on customers
- IAC0302 Explain the concept of using professional language when interacting with customers
- IAC0303 Explain the principles of verbal and non-verbal communication in retail and wholesale sales
- IAC0304 Explain the importance of listening skills when communicating with customers
- IAC0305 List and explain four principles of telephone etiquette in retail

***(Weight 25%)***

**1.2.4. KM-01-KT04: The concept and importance of resolving customer queries (20%)**

***Topic elements to be covered include:***

- KT0401 Generally accepted types of customer queries in the retail and wholesale sales environment
- KT0402 The importance of responding accurately to customer queries

- KT0403 Generally accepted ways of responding to or resolving customer queries

***Internal Assessment Criteria and Weight***

- IAC0401 List four (4) examples of generally accepted types of customer queries in the retail and wholesale sales environment
- IAC0402 Explain the importance of responding to customer queries
- IAC0403 Describe generally accepted ways of responding to or resolving customer queries

***(Weight 20%)***

**1.2.5. KM-01-KT05: Handling customer complaints (15%)**

***Topic elements to be covered include:***

- KT0501 Generally accepted ways of handling a customer complaint
- KT0502 The difference between a customer complaint and a query
- KT0503 Typical steps to dealing with an upset or angry customer
- KT0504 The effect that resolving customer complaints has on sales
- KT0505 Principles of escalating customer queries and complaints
- KT0506 The impact of the Consumer Protection Act on handling customer complaints

***Internal Assessment Criteria and Weight***

- IAC0501 Explain the generally accepted ways of handling a customer complaint
- IAC0502 Explain the difference between a customer complaint and a query
- IAC0503 List and explain the typical steps to dealing with an angry or upset customer
- IAC0504 Explain how resolving customer complaints could have an effect on sales
- IAC0505 Explain the principles of escalating customer queries and complaints

***(Weight 15%)***

**1.3 Provider Programme Accreditation Criteria**

***Physical Requirements:***

- Training materials, Learner Guide, Facilitator Guide, Hand outs, Visual Aids.

***Human Resource Requirements:***

- Facilitators must have relevant industry and facilitation experience related to the subject. Ratio of 1 facilitator to a maximum of 30 learners.
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a Supervisor/Manager with at least

1 years' experience relevant to the subject. Assessors must have relevant industry experience related to the subject.

*Legal Requirements:*

- A legal business entity.
- Meet health and safety standards

**1.4 Exemptions**

- None

## **2. 522301001-KM-02: Principles of service excellence and building customer relationships in retail and wholesale sales, NQF Level 3, Credits 3**

### **2.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of service excellence and building customer relationships in retail and wholesale sales.

The learning will enable learners to demonstrate an understanding of:

- KM-02-KT01: The different types of service environments (15%)
- KM-02-KT02: Concepts and principles of service excellence (50%)
- KM-02-KT03: Principles of building customer relationships (35%)

### **2.2 Guidelines for Topics**

#### **2.2.1. KM-02-KT01: The different types of service environments (15%)**

***Topic elements to be covered include:***

- KT0101 Types of service environments in the retail and wholesale industry including self-service, partial service and full service businesses
- KT0102 Similarities between self-service, partial service and full service wholesale and retail outlets
- KT0103 Differences between self-service, partial service and full service wholesale and retail outlets
- KT0104 The impact of the service environment on the customer service offered by a retail or wholesale outlet

***Internal Assessment Criteria and Weight***

- IAC0101 List the different types of service environments in the wholesale and retail industry giving an example for each
- IAC0102 Explain the similarities between self-service, partial service and full service wholesale and retail outlets
- IAC0103 Explain the differences between self-service, partial service and full service wholesale and retail outlets
- IAC0104 Explain the impact that the service environment has on customer service offered by a retail or wholesale outlet

***(Weight 15%)***

#### **2.2.2. KM-02-KT02: Concepts and principles of service excellence (50%)**

***Topic elements to be covered include:***

- KT0201 The difference between customer service and service excellence
- KT0202 The importance of adherence to service standards of an organisation
- KT0203 The concept of the circle of service in providing customer service in a retail or wholesale outlet

- KT0204 The impact of good customer service on sales
- KT0205 The impact of poor customer service on sales
- KT0206 The impact of knowledge of the store layout and awareness of stock availability on the level of service
- KT0207 The importance of an awareness of promotions on offer on customer service
- KT0208 The impact of the Consumer Protection Act on the sales

***Internal Assessment Criteria and Weight***

- IAC0201 Explain the difference between customer service and service excellence
- IAC0202 Explain the importance of adhering to service standards of an organisation
- IAC0203 Explain the circle of service when providing customer service with examples
- IAC0204 Explain the impact that good service has on sales using examples
- IAC0205 Explain the impact that poor service has on sales using examples
- IAC0206 Explain the impact of knowledge of the store layout and awareness of stock availability and awareness of promotions has on the level of service excellence
- IAC0207 Explain the impact that the Consumer Protection Act has on sales

***(Weight 50%)***

**2.2.3. KM-02-KT03: Principles of building customer relationships (35%)**

***Topic elements to be covered include:***

- KT0301 Generally accepted ways of building professional customer relationships in the wholesale and retail industry
- KT0302 The difference between building customer relationships and offering customer service in a partial or full service retail sales environment
- KT0303 The importance of prospecting customers to build customer relationships, used by some retail organisations
- KT0304 The impact of healthy customer relationships on the sales person and the business
- KT0305 Generally accepted organisational tools or strategies for encouraging the customer to come back and shop again
- KT0306 The impact of following up on building healthy customer relationships
- KT0307 The influence of customer service experience on future business

***Internal Assessment Criteria and Weight***

- IAC0301 Explain the difference between building customer relationships and offering customer service

- IAC0302 Explain generally accepted ways of building professional customer relationships in the wholesale and retail sales environment
- IAC0303 Explain the importance of prospecting customers to build customer relationships used by some retail organisations
- IAC0304 Explain the impact of healthy customer relationships on the sales person or the business
- IAC0305 Describe generally accepted retail organisational tools or strategies used for encouraging the customer to come back and shop again
- IAC0306 Describe the impact that following up has on building healthy customer relationships
- IAC0307 Explain the influence that the customer service experience has on future business

**(Weight 35%)**

### **2.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Training materials, Learner Guide, Facilitator Guide, Hand outs, Visual Aids

#### *Human Resource Requirements:*

- Facilitators must have relevant industry and facilitation experience related to the subject. Ratio of 1 facilitator to a maximum of 30 learners.
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a Supervisor/Manager with at least 1 years' experience relevant to the subject. Assessors must have relevant industry experience related to the subject.

#### *Legal Requirements:*

- A legal business entity.
- Meet health and safety standards

### **2.4 Exemptions**



### **3. 522301001-KM-03: Concepts and principles of selling in a full service retail and wholesale environment, NQF Level 3, Credits 4**

#### **3.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of selling products or services to customers in a full service retail or wholesale sales environment using the sales cycle and advanced sales skills.

The learning will enable learners to demonstrate an understanding of:

- KM-03-KT01: Concepts and principles of managing own sales targets (15%)
- KM-03-KT02: Concepts and principles of the sales cycle (70%)
- KM-03-KT03: Principles of advanced selling skills (15%)

#### **3.2 Guidelines for Topics**

##### **3.2.1. KM-03-KT01: Concepts and principles of managing own sales targets (15%)**

***Topic elements to be covered include:***

- KT0101 The concept and impact of sales targets on the retail sales advisor in the wholesale and retail environment
- KT0102 The difference between team targets and personal sales targets in a wholesale or retail outlet
- KT0103 Generally accepted ways of planning to achieve set sales targets through self-management, self-motivation and commitment to the target

***Internal Assessment Criteria and Weight***

- IAC0101 Explain the concept and impact of sales targets on the retail sales advisor in the wholesale and retail environment
- IAC0102 Explain the difference between team targets and personal sales targets in a wholesale or retail outlet
- IAC0103 Describe generally accepted ways of planning to achieve set sales targets through self-management, self-motivation and commitment to the target

***(Weight 15%)***

##### **3.2.2. KM-03-KT02: Concepts and principles of the sales cycle (70%)**

***Topic elements to be covered include:***

- KT0201 Generally accepted ways of preparing for sales
- KT0202 The reasons why customers buy
- KT0203 Ways to approach customers
- KT0204 Principles of qualifying customer needs through the use of questioning
- KT0205 The importance of product knowledge

- KT0206 Sources of product knowledge
- KT0207 Concepts and principles of using features, advantages and benefits of products when demonstrating products in the sales cycle
- KT0208 Types of objections experienced during the sales cycle
- KT0209 Generally accepted ways of overcoming objections
- KT0210 Positive and negative customer buying signals
- KT0211 Generally accepted ways of closing the sale
- KT0212 Principles of providing after sales service
- KT0213 The difference between providing after sales service in a partial service sales environment and the full service sales environment
- KT0214 Psychology of selling through the sales cycle

***Internal Assessment Criteria and Weight***

- IAC0201 Explain the generally accepted ways of preparing for sales
- IAC0202 Explain the importance of understanding customers buying motives
- IAC0203 List and explain three ways to approach customers in a retail outlet
- IAC0204 Describe the principles of qualifying customer needs through the use of questioning
- IAC0205 Explain the importance of product knowledge in the retail or wholesale sales environment
- IAC0206 List two sources of obtaining product knowledge in the industry
- IAC0207 Explain the concepts and principles of using features, advantages and benefits of products when demonstrating products in the sales cycle
- IAC0208 List three types of objections experienced during the sales cycle
- IAC0209 Explain generally accepted ways of overcoming objections
- IAC0210 Describe positive and negative customer buying signals
- IAC0211 List and explain five generally accepted ways of closing a sale
- IAC0212 Explain the principles of providing after sales service using examples
- IAC0213 Explain the difference between providing after sales service in a partial service sales environment and the full service sales environment
- IAC0214 Explain the psychology of selling through the sales cycle using examples

***(Weight 70%)***

**3.2.3. KM-03-KT03: Principles of advanced selling skills (15%)**

***Topic elements to be covered include:***

- KT0301 Principles and the importance of selling-up
- KT0302 Principles of add-on sales
- KT0303 The impact that add-on sales and selling-up has on the sales person and the business
- KT0304 Concept of selling alternative products
- KT0305 Types of supplementary services offered in wholesale and retail

***Internal Assessment Criteria and Weight***

- IAC0301 Explain the principles and importance of selling-up during a sale
- IAC0302 Explain the principles of add-on sales
- IAC0303 Describe the impact that add-on sales and selling-up has on the sales person and the business
- IAC0304 Explain the concept of selling alternative products
- IAC0305 List three types of supplementary services offered in the wholesale and retail industry

***(Weight 15%)***

**3.3 Provider Programme Accreditation Criteria**

*Physical Requirements:*

- Training materials, Learner Guide, Facilitator Guide, Hand outs, Visual Aids

*Human Resource Requirements:*

- Facilitators must have relevant industry and facilitation experience related to the subject. Ratio of 1 facilitator to a maximum of 30 learners.
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a Supervisor/Manager with at least 1 years' experience relevant to the subject. Assessors must have relevant industry experience related to the subject.

*Legal Requirements:*

- A legal business entity.
- Meet health and safety standards

**3.4 Exemptions**

- None
- None

## SECTION 3B: PRACTICAL SKILL MODULE SPECIFICATIONS

### List of Practical Skill Module Specifications

- 522301001-PM-01, Interact with different types of customers and present a positive image, NQF Level 2, Credits 2
- 522301001-PM-02, Handle customer queries and complaints, NQF Level 2, Credits 2
- 522301001-PM-03, Provide customer service and build customer relationships, NQF Level 3, Credits 2
- 522301001-PM-04, Sell products to customers using the sales cycle, NQF Level 3, Credits 3
- 522301001-PM-05, Use advanced selling techniques, NQF Level 3, Credits 2

## **1. 522301001-PM-01: Interact with different types of customers and present a positive image, NQF Level 2, Credits 2**

### **1.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practise interacting with different types of customers and presenting a positive image to enhance the customer service experience.

The learner will be required to:

- PM-01-PS01: Greet different types of customers telephonically
- PM-01-PS02: Approach different types of customers face-to-face
- PM-01-PS03: Present a professional and positive image

### **1.2 Guidelines for Practical Skills**

#### **1.2.1. PM-01-PS01: Greet different types of customers telephonically**

##### ***Scope of Practical Skill***

Given a set of case scenarios comprising of various types of customers (in a hurry, irritated, happy etc.) phoning the outlet where each learner takes the role of the staff member and the customer, the learner must be able to:

- PA0101 Greet the customer using appropriate verbal communication
- PA0102 Make introductions by introducing oneself, the appropriate company and department
- PA0103 Offer to be of service

##### ***Applied Knowledge***

- AK0101 Techniques for analysing role play scenarios
- AK0102 Techniques for verbal communication
- AK0103 Methods for interacting with customers over a telephone
- AK0104 Methods for speaking clearly and using a telephone appropriately
- AK0105 Methods for greeting customers using a telephone

##### ***Internal Assessment Criteria***

- IAC0101 The manner in which the customer is greeted, is appropriate to the case scenario, uses a professional manner with appropriate communication and should result in a positive customer interaction
- IAC0102 The introductions made includes the introduction of the learner, the company and department appropriate to the case scenario
- IAC0103 The service offered to the customer is handled in a professional manner where the reason for the call appropriate to the case scenario is recorded

#### **1.2.2. PM-01-PS02: Approach different types of customers face-to-face**

### ***Scope of Practical Skill***

Given a set of role-play scenarios with information comprising of various types of customers (in a hurry, irritated, happy etc.) from diverse cultures, age groups and genders, including unattended customers visiting an outlet, where each learner plays the role of the sales assistant and the customer, the learner must be able to:

- PA0201 Acknowledge the customer
- PA0202 Approach and greet the customer in professional manner using appropriate communication skills
- PA0203 Introduce themselves and find out the customer's name
- PA0204 Offer to be of service

### ***Applied Knowledge***

- AK0201 Techniques for analysing case scenarios
- AK0202 Techniques for acknowledging, approaching and greeting diverse customers
- AK0203 Techniques for making introductions and offering to be of service

### ***Internal Assessment Criteria***

- IAC0201 The manner in which the customer is acknowledged, approached and greeted is appropriate to the scenario and should result in a positive customer service experience.
- IAC0202 The response includes the introduction, finding out the customer's name and offering to be of service appropriate to the scenario

## **1.2.3. PM-01-PS03: Present a professional and positive image**

### ***Scope of Practical Skill***

Given a set of case scenarios, photographs of retail staff members with poor and good personal grooming and hygiene habits, information comprising of situations with customers where the staff member has bad breath, unpleasant body odours, dirty hands, chew gum, un-ironed and dirty clothing, with different attitudes, the learner must be able to:

- PA0301 Identify poor grooming and personal hygiene habits
- PA0302 Identify good grooming and personal hygiene habits
- PA0303 Recommend improvements to personal hygiene and grooming
- PA0304 Create a checklist to check own personal hygiene and grooming

### ***Applied Knowledge***

- AK0301 Techniques for analysing case scenarios
- AK0302 Techniques for promoting a positive image in a work environment
- AK0303 Techniques for recommending improvements to personal hygiene and grooming habits
- AK0304 Steps to creating checklists

- AK0305 Methods for analysing photographs

### ***Internal Assessment Criteria***

- IAC0301 Poor grooming and personal hygiene is correctly identified from the given scenarios
- IAC0302 Good grooming and personal hygiene is correctly identified from the given scenarios
- IAC0303 The recommendations for improvement to personal hygiene and grooming habits are correct as they apply to the given scenario
- IAC0304 The checklist created to check own personal hygiene and grooming habits include generally accepted standards used in the industry to promote a positive image in the workplace

### **1.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- A simulated or actual wholesale or retail sales environment, or classroom
- Classroom furniture (chairs and tables, audio-visual equipment and all other equipment conducive to a learning environment)
- Learning material for interacting with different types of diverse customers and presenting a positive and professional image
- Sets of information as per the scenarios, pictures or photographs

#### *Human Resource Requirements:*

- Facilitators must have relevant knowledge and exposure to interacting with different types of customers and presenting a professional image.
- Ratio of 1 facilitator to maximum of 30 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a Supervisor/Manager with at least 1 years' experience relevant to the subject.
- Assessors must have relevant industry experience related to the subject

#### *Legal Requirements:*

- A legal business entity.
- Meet health and safety standards

### **1.4 Exemptions**

- None

## **2. 522301001-PM-02: Handle customer queries and complaints, NQF Level 2, Credits 2**

### **2.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practise handling customer queries and complaints in a wholesale and retail environment.

The learner will be required to:

- PM-02-PS01: Handle customer queries
- PM-02-PS02: Handle customer complaints

### **2.2 Guidelines for Practical Skills**

#### **2.2.1. PM-02-PS01: Handle customer queries**

##### ***Scope of Practical Skill***

Given case scenarios or DVD's with a variety of typical customer queries including queries on product location, product availability, price, promotion queries and department queries, information detailing resources available for the escalation of queries, policies and procedures for the handling of customer queries, the learner must be able to:

- PA0101 Identify the customer query
- PA0102 Respond to the customer query
- PA0103 Escalate customer queries

##### ***Applied Knowledge***

- AK0101 Techniques for identifying customer queries
- AK0102 Methods for responding to customer queries
- AK0103 Methods for escalating customer queries

##### ***Internal Assessment Criteria***

- IAC0101 The customer query is identified according to the case scenario
- IAC0102 The response to the customer query is appropriate and results in the customer's need for more information being met
- IAC0103 The customer queries that require escalation are correctly identified and recommendations made on how to escalate the query are appropriate to the given case scenario

#### **2.2.2. PM-02-PS02: Handle customer complaints**

##### ***Scope of Practical Skill***

Given case scenarios or DVD's with a variety of typical customer complaints including complaints regarding poor customer service, inferior products, product failure, product damages, poor staff availability, long queue waits, rude staff members, sales staff members who argue with each other in front of the customer, information detailing resources available for the escalation of complaints, the learner must be able to:

- PA0201 Respond to customer complaints



- PA0202 Handle upset customers
- PA0203 Escalate the complaint

### ***Applied Knowledge***

- AK0201 Techniques for handling customer complaints
- AK0202 Techniques for analysing case scenarios
- AK0203 Techniques and steps for handling upset customers
- AK0204 Techniques and processes for escalating customer complaints

### ***Internal Assessment Criteria***

- IAC0201 Customer complaints are identified and responded to according to the given case scenario in a manner where the complaint is resolved
- IAC0202 Upset customers are identified and appropriate actions are recommended in order to facilitate the calming of the customer
- IAC0203 The customer complaints that require escalation are correctly identified and recommendations made on how to escalate the complaint are appropriate to the given case scenario

## **2.3 Provider Programme Accreditation Criteria**

### ***Physical Requirements:***

- A simulated or actual wholesale or retail sales environment, or classroom
- Classroom furniture (chairs and tables, audio-visual equipment and all other equipment conducive to a learning environment)
- Learning material for handling customer queries and complaints
- Sets of information, case scenarios, customer queries and complaints

### ***Human Resource Requirements:***

- Facilitators must have relevant knowledge and exposure to interacting with different types of customers and presenting a professional image.
- Ratio of 1 facilitator to maximum of 30 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a Supervisor/Manager with at least 1 years' experience relevant to the subject.
- Assessors must have relevant industry experience related to the subject.

### ***Legal Requirements:***

- A legal business entity.
- Meet health and safety standards

## **2.4 Exemptions**

- None

### **3. 522301001-PM-03: Provide customer service and build customer relationships, NQF Level 3, Credits 2**

#### **3.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practise providing customer service to internal and external customers, providing after sales service and building and enhancing customer relationships in the wholesale and retail environment.

The learner will be required to:

- PM-03-PS01: Provide customer service to internal customers
- PM-03-PS02: Provide customer service to external customers
- PM-03-PS03: Provide after sales service
- PM-03-PS04: Enhance customer relationships

#### **3.2 Guidelines for Practical Skills**

##### **3.2.1. PM-03-PS01: Provide customer service to internal customers**

###### ***Scope of Practical Skill***

Given case scenarios with a variety of typical internal customer service situations, a list of internal customers who a retail sales assistant or sales advisor would provide service to including the stock clerk, cashier, merchandisers or manager, the learner must be able to:

- PA0101 Identify the internal customer service situation
- PA0102 Respond to the internal customer service situation
- PA0103 Identify the impact that service provided to the internal customer has on the external customer

###### ***Applied Knowledge***

- AK0101 Techniques for identifying customer queries
- AK0102 Methods for responding to customer queries
- AK0103 Methods for analysing case scenarios

###### ***Internal Assessment Criteria***

- IAC0101 The internal customer service situation is correctly identified according to the case scenario
- IAC0102 The response to the internal customer service situation is appropriate to the scenario given and results in the internal customers' needs being met
- IAC0103 The impact of the service provided to the internal customer affecting the external customer is correctly identified

##### **3.2.2. PM-03-PS02: Provide customer service to external customers**

###### ***Scope of Practical Skill***

Given case scenarios with a variety of typical positive and negative external customer service situations and moments of truth, including where a customer has come in for a product that is out of stock and needs an alternative and information relating to customer comments on service that the retail store has provided, the learner must be able to:

- PA0201 Identify the positive external customer service situations or moments of truth
- PA0202 Identify the negative external customer service situations or moments of truth
- PA0203 Analyse the customer comments on service and identify the positive or negative customer service feedback

#### ***Applied Knowledge***

- AK0201 Techniques for identifying positive and negative external customer service situations and moments of truth
- AK0202 Techniques for analysing case scenarios

#### ***Internal Assessment Criteria***

- IAC0201 The positive and negative moments of truth are identified appropriate to each external customer service scenario
- IAC0202 The customer comments provided are analysed and identified as positive or negative customer service feedback

### **3.2.3. PM-03-PS03: Provide after sales service**

#### ***Scope of Practical Skill***

Given case scenarios and sets of information comprising of a variety of typical sales situations, a variety of customer needs, information on diverse customers, the learner must be able to:

- PA0301 Identify after sales service opportunities
- PA0302 Propose action to provide after sales service

#### ***Applied Knowledge***

- AK0301 Techniques for identifying after sales service opportunities
- AK0302 Methods for providing after sales service
- AK0303 Methods for analysing case scenarios and sets of information

#### ***Internal Assessment Criteria***

- IAC0301 The after sales service opportunities identified are appropriate to the scenario and promotes good customer relations
- IAC0302 The action proposed to provide after sales service is practical and would have the desired effect of promoting customer service to the customer after a sale has been concluded

### **3.2.4. PM-03-PS04: Enhance customer relationships**

### ***Scope of Practical Skill***

Given sets of information comprising of a list of customers, client information, records of past orders, customer loyalty information, promotional information, information relating to what the customer has indicated they need for their next purchase, the learner must be able to:

- PA0401 Identify the customers past purchases
- PA0402 Identify the customers future purchase plans
- PA0403 Match the customer's future purchase plan information to the simulated promotion or customer loyalty information

### ***Applied Knowledge***

- AK0401 Techniques for identifying customer past purchases and future purchase plans
- AK0402 Methods for enhancing customer relationships
- AK0403 Generally accepted customer loyalty programmes
- AK0404 Techniques for analysing case scenarios

### ***Internal Assessment Criteria***

- IAC0401 The customers past purchases are correctly identified for three (3) customers as applicable to the information given
- IAC0402 The future purchase plans are correctly identified for three (3) customers as applicable to the information given
- IAC0403 The customers' future purchase plan information is correctly matched to the promotion or customer loyalty information as applicable to the information given

## **3.3 Provider Programme Accreditation Criteria**

### ***Physical Requirements:***

- A simulated or actual wholesale or retail sales environment, or classroom
- Classroom furniture (chairs and tables, audio-visual equipment and all other equipment conducive to a learning environment)
- Learning material for providing customer service to internal and external customers, providing after sales service and enhancing and building customer relations.
- Sets of information, case scenarios, promotion examples, customer loyalty information, customer information, future purchase plan information

### ***Human Resource Requirements:***

- Facilitators must have relevant knowledge and exposure to interacting with different types of customers and presenting a professional image.
- Ratio of 1 facilitator to maximum of 30 learners

- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a Supervisor/Manager with at least 1 years' experience relevant to the subject.
- Assessors must have relevant industry experience related to the subject.

*Legal Requirements:*

- A legal business entity.
- Meet health and safety standards

**3.4 Exemptions**

- None

## **4. 522301001-PM-04: Sell products to customers using the sales cycle, NQF Level 3, Credits 3**

### **4.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practise selling products to customers using the sales cycle and creating features, advantages and benefit product sheets to enhance the demonstration of the product.

The learner will be required to:

- PM-04-PS01: Use the sales cycle to sell products
- PM-04-PS02: Develop features, advantages and benefit product sheets

### **4.2 Guidelines for Practical Skills**

#### **4.2.1. PM-04-PS01: Use the sales cycle to sell products**

##### ***Scope of Practical Skill***

Given sets of role play scenarios and sets of information comprising of typical customer wholesale and retail sales situations, a variety of products that the customer could be looking for, a variety of customer buying motives, features, advantages and benefits sheets of each product, types of approaches including the service, merchandise and personal approach, types of objections including the price and delay objection and various sale closes, where each learner must play the role of the sales advisor and the customer, the learner must be able to:

- PA0101 Approach the customer
- PA0102 Qualify the customer's needs
- PA0103 Demonstrate the product to the customer using the features, advantages and benefits of the product
- PA0104 Overcome the objection
- PA0105 Close the sale

##### ***Applied Knowledge***

- AK0101 Techniques for responding to the various scenarios
- AK0102 Verbal and non-verbal communication techniques
- AK0103 Steps of the sales cycle
- AK0104 Methods for approaching customers using the personal, service and merchandise approach
- AK0105 Questioning techniques
- AK0106 Techniques for demonstrating the product to customers using features, advantages and benefits
- AK0107 Techniques and steps for overcoming objections
- AK0108 Techniques for closing the sale
- AK0109 Active listening techniques

- AK0110 Methods for identifying customers positive buying signals

#### ***Internal Assessment Criteria***

- IAC0101 The customer is approached in a friendly manner using the approach as applicable to the scenario so that the customer engages in the start of the sales process
- IAC0102 Questioning techniques are used where open ended questions allow for conversation between the sales advisor and the customer and result in the discovery of the buying motive or customer's buying need
- IAC0103 The product is demonstrated in line with the information given where the features, advantages and benefits are explained in a manner that results in the benefits of the product being linked to the customer's buying need, appropriate to the scenario
- IAC0104 Objections presented by the role-play customer are overcome through active listening techniques appropriate to the scenario
- IAC0105 The sales advisor closes the sale appropriate to the scenario in response to positive buying signals displayed by the customer in the role-play

#### **4.2.2. PM-04-PS02: Develop features, advantages and benefit product sheets**

##### ***Scope of Practical Skill***

Given a variety of everyday products, sets of additional information on features, a list of common buying motives and sheets to record features, advantages and benefits, the learner must be able to:

- PA0201 Identify features of a given product
- PA0202 Create advantages explaining the product features
- PA0203 Match benefits to each product feature
- PA0204 Match benefits to a variety of buying motives

##### ***Applied Knowledge***

- AK0201 Methods for identifying product features
- AK0202 Techniques for explaining features as advantages
- AK0203 Techniques for identifying and creating benefits for product features
- AK0204 Steps to completing product sheets
- AK0205 Methods for matching benefits to potential buying motives

#### ***Internal Assessment Criteria***

- IAC0201 The features of the given product are identified and recorded on the product sheet
- IAC0202 The advantages explain the feature clearly and also explain any terminology that would be unfamiliar to a potential customer
- IAC0203 The benefit for each product feature is correctly matched as applicable to the information given



- IAC0204 The benefits are matched to the buying motive applicable to the information given

### **4.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Role-play sheets to prepare for the role play.
- Role-play scenarios and information including typical customer wholesale and retail sales situations, a variety of products that the customer could be looking for, a variety of customer buying motives, features, advantages and benefits sheets of each product, types of approaches including the service, merchandise and personal approach, types of objections including the price and delay objection and various sale closes.
- A variety of easily available products (for example: cool drink, bottled water, pen, ruler, chair, desk).
- Sets of information comprising of product features for each product physically made available, a list of common buying motives.
- Sheets to record the Features, Advantages and benefits.
- Classroom furniture (chairs and tables, audio-visual equipment and all other equipment conducive to a learning environment).
- Learner materials for selling products using the sales cycle and developing features, advantages and benefit product sheets.

#### *Human Resource Requirements:*

- Facilitators must have relevant knowledge and exposure to selling goods in a wholesale or retail environment.
- Ratio of 1 facilitator to maximum of 30 learners.
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a Supervisor/Manager with at least 1 years' experience relevant to the subject

#### *Legal Requirements:*

- A legal business entity.
- Meet health and safety standards

### **4.4 Exemptions**

- None

## **5. 522301001-PM-05: Use advanced selling techniques, NQF Level 3, Credits 2**

### **5.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practise selling products to customers using advanced selling techniques including adding-on, selling up, offering alternative products and selling supplementary services.

The learner will be required to:

- PM-05-PS01: Sell add-on products and supplementary services
- PM-05-PS02: Use selling up techniques and offering alternative product sales

### **5.2 Guidelines for Practical Skills**

#### **5.2.1. PM-05-PS01: Sell add-on products and supplementary services**

##### ***Scope of Practical Skill***

Given a set of case scenarios detailing customers who have made a decision to purchase a product, additional sets of information comprising of a list of potential add-on products, a list of potential supplementary services, information detailing the customers' needs, the learner must be able to:

- PA0101 Identify add-on products naturally beneficial to the product the customer has purchased as applicable to the scenario
- PA0102 Match supplementary services to the customers' needs as applicable to the scenario

##### ***Applied Knowledge***

- AK0101 Techniques analysing case scenarios and additional sets of information
- AK0102 Steps for matching supplementary services to customer needs
- AK0103 Methods for matching naturally beneficial add-on products to other products

##### ***Internal Assessment Criteria***

- IAC0101 Naturally beneficial add-on products are identified appropriate to the product purchased in the scenario given and would have the desired effect of the customer including these items in their purchase
- IAC0102 Supplementary services are matched appropriate to the customers' needs and are appropriate to the scenario

#### **5.2.2. PM-05-PS02: Use selling up techniques and offering alternative product sales**

##### ***Scope of Practical Skill***

Given a set of case scenarios detailing customers who have made a decision to purchase a product which is not available in store, or have come in to purchase a product that doesn't meet their needs, additional sets of information comprising of a list of alternative products, a range of other products in a specific product line, product information sheets, pictures of products and information detailing the customers' needs, the learner must be able to:

- PA0201 Identify products where the selling up technique can be used in a way that matches the customers' buying need

- PA0202 Identify products where the alternative products can be used in a way that matches the customers' buying need

### ***Applied Knowledge***

- AK0201 Techniques for analysing case scenarios and additional sets of information
- AK0202 Selling up techniques
- AK0203 Sequences used when selling up
- AK0204 Methods for offering alternative products

### ***Internal Assessment Criteria***

- IAC0201 Products appropriate for the selling up are identified appropriate to the case scenario given and match the customers' buying need
- IAC0202 Products appropriate to offer as alternatives are identified appropriate to the case scenario and match the customers' buying need

## **5.3 Provider Programme Accreditation Criteria**

### ***Physical Requirements:***

- Set information including case scenarios, typical customer wholesale and retail sales situations detailing customers who have made a decision to purchase a product, additional sets of information comprising of a list of potential add-on products, a list of potential supplementary services, information detailing the customers' needs.
- Case scenarios detailing customers who have made a decision to purchase a product which is not available in store, or have come in to purchase a product that doesn't meet their needs, additional sets of information comprising of a list of alternative products, a range of other products in a specific product line, product information sheets, pictures of products and information detailing the customers' needs.
- Classroom furniture (chairs and tables, audio-visual equipment and all other equipment conducive to a learning environment).
- Learner materials for selling products using the sales cycle and developing features, advantages and benefit product sheets.

### ***Human Resource Requirements:***

- Facilitators must have relevant knowledge and exposure to selling goods in a wholesale or retail environment.
- Ratio of 1 facilitator to maximum of 30 learners.
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a Supervisor/Manager with at least 1 years' experience relevant to the subject.

### ***Legal Requirements:***

- A legal business entity.

- Meet health and safety standards

#### **5.4 Exemptions**

- None

## SECTION 3C: WORK EXPERIENCE MODULE SPECIFICATIONS

### List of Work Experience Module Specifications

- 522301001-WM-01, Processes and procedures for attending to different types of customers, handling customer queries and communicating with customers, NQF Level 2, Credits 10
- 522301001-WM-02, Processes and procedures for providing customer service, NQF Level 3, Credits 8
- 522301001-WM-03, Processes and procedures for selling products to customers using the sales cycle and advanced selling techniques in a full service wholesale or retail sales environment, NQF Level 03, Credits 14

# **1. 522301001-WM-01: Processes and procedures for attending to different types of customers, handling customer queries and communicating with customers, NQF Level 2, Credits 10**

## **1.1 Purpose of the Work Experience Modules**

The focus of the work experience is on providing the learner an opportunity to gain exposure to communicating with and attending to a variety of customers and handling their queries in a retail or wholesale environment. The Learner will be required to successfully complete each Work Experience for at least one week under supervision before operating for one weeks independently. Work experience for the different modules may occur concurrently.

The learning contact time which constitutes the total amount of time during which the learner needs to have access to the workplace to enable him or her to acquire the knowledge and understanding specified for this module is 12.5 days after which the assessment may take place.

The learner will be required to:

- WM-01-WE01: Attend to different types of customers
- WM-01-WE02: Handle a variety of customer queries in the outlet

## **1.2 Guidelines for Work Experiences**

### **1.2.1. WM-01-WE01: Attend to different types of customers**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Greet customers appropriately according to organisational standards
- WA0102 Acknowledge unattended customers
- WA0103 Communicate with customers in a verbal and non-verbal manner

#### ***Supporting Evidence***

- SE0101 Documentary evidence confirming that the learner has greeted a variety of customers in line with organisational standards, signed off by the learner's supervisor
- SE0102 Documentary evidence confirming that the learner has acknowledged a variety of unattended customers in line with organisational standards, signed off by the learner's supervisor
- SE0103 Documentary evidence confirming that the learner has communicated verbally and non-verbally with a variety of customers in line with organisational standards, signed off by the learner's supervisor

### **1.2.2. WM-01-WE02: Handle a variety of customer queries in the outlet**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Apply active listening skills when handling customer queries
- WA0202 Handle a variety of customer queries in line with organisational processes and procedures

- WA0203 Escalate queries in line with organisational processes and procedures

### **Supporting Evidence**

- SE0201 Documentary evidence confirming the learner has listened to the customer and understood their query when handling customer queries, signed off by the learner's supervisor
- SE0202 Documentary evidence confirming the learner has followed organisational processes and procedures when handling a variety of customer queries for at least four (4) queries, signed off by the learner's supervisor
- SE0203 Documentary evidence confirming that the learner has appropriately escalated queries they cannot solve in line with organisational requirements, signed off by the learner's supervisor

### **1.3 Contextualised Workplace Knowledge**

1. Organisational standards for attending to a variety of customers in a wholesale or retail environment
2. Organisational policies and procedures for communicating with customers
3. Organisational policies and procedures for handling a variety of customer queries
4. Organisational policies and procedures for escalating customer queries
5. Organisational store layout
6. Organisational policies and procedures for handling product availability queries
7. Organisational policies and procedures for directing customers to different departments within an outlet
8. Organisational customer service standards

### **1.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- Operational wholesale or retail store serving a variety of customers.

#### *Human Resource Requirements:*

- Supervisor/Manager with at least 1 year experience of serving customers and handling customer queries.

#### *Legal Requirements:*

- Registered as a formal business.
- Compliant with all relevant legal requirements for a wholesale or retail store.

### **1.5 Additional Assignments to be Assessed Externally**

All evidence produced relating to the following workplace experience must be submitted for external assessment. Attending to different kinds of customers and handling a variety of customer queries in the outlet.

## **2. 522301001-WM-02: Processes and procedures for providing customer service, NQF Level 3, Credits 8**

### **2.1 Purpose of the Work Experience Modules**

The focus of the work experience is on providing the learner an opportunity to gain exposure to providing customer service in a wholesale or retail outlet. The learner will be required to successfully complete each Work Experience for at least 1 week under supervision before operating independently for a further 1 week. Work experience for the different modules may occur concurrently.

The learning contact time constitutes the total amount of time during which the learner needs to have access to the workplace to enable him or her to acquire the knowledge and understanding specified for this module is 10 days after which the assessment may take place.

The learner will be required to:

- WM-02-WE01: Provide service to customers
- WM-02-WE02: Enhance customer relationships

### **2.2 Guidelines for Work Experiences**

#### **2.2.1. WM-02-WE01: Provide service to customers**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Promote a positive and professional image and greet customers in line with organisational standards
- WA0102 Provide customer service to a variety of customers including finding the product or offering alternative products in line with organisational standards

##### ***Supporting Evidence***

- SE0101 Documentary evidence confirming that the learner has promoted a positive and professional image and has greeted customers in line with organisational standards
- SE0102 Documentary evidence confirming that the learner has provided customer service to a variety of customers in line with organisational standards including finding the right product or offering alternative products, signed off by the learner's supervisor
- SE0103 A checklist designed by the learner detailing all aspects required to promote a positive and professional image in line with organisational standards, signed off by the learner's supervisor

#### **2.2.2. WM-02-WE02: Enhance customer relationships**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Use organisational customer loyalty programmes or additional services to enhance customer relationships
- WA0202 Re-serving or maintaining existing customer relationships in line with organisational processes and procedures



- WA0203 Give the customer a final greeting that encourages the customer to return to the store

### **Supporting Evidence**

- SE0201 Documentary evidence confirming that the learner has offered customer loyalty programmes or additional services according to organisational policies and procedures for at least five (5) customer interactions, signed off by the learner's supervisor
- SE0202 Documentary evidence confirming that the learner has re-served or maintained at least five (5) existing customers in line with organisational processes and procedures.
- SE0203 Documentary evidence confirming that the learner has given the customer a final greeting that encourages the customer to return to the store for at least five (5) customer interactions

### **2.3 Contextualised Workplace Knowledge**

1. Organisational policies and procedures for building customer relationships in a full or partial service sales environment
2. Organisational policies and procedures for re-serving and maintaining existing customers
3. Organisational policies and procedures for promoting customer loyalty programmes
4. Organisational policies and procedures for promoting additional customer services
5. Organisational policies and procedures for promoting a positive and professional image in the workplace
6. Organisational policies and procedures for housekeeping

### **2.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- Operational wholesale or retail store providing customer service and enhancing relationships with a variety of customers.

#### *Human Resource Requirements:*

- Supervisor/Manager with at least 1 year experience of providing customer service and building customer relationships.

#### *Legal Requirements:*

- Registered as a formal business.
- Compliant with all relevant legal requirements for a wholesale or retail store.

### **2.5 Additional Assignments to be Assessed Externally**

All evidence produced relating to the following workplace experience must be submitted for external assessment. Provide service to customers, enhance customer relationships

### **3. 522301001-WM-03: Processes and procedures for selling products to customers using the sales cycle and advanced selling techniques in a full service wholesale or retail sales environment, NQF Level 03, Credits 14**

#### **3.1 Purpose of the Work Experience Modules**

The focus of the work experience is on providing the learner an opportunity to gain exposure to all processes for selling products using the sales cycle including approaching customers, qualifying their needs, demonstrating products, overcoming objections, closing the sale and providing after sales service as well as demonstrating advanced selling techniques including add-on sales, supplementary services, selling up, selling alternative products and prospecting for new customers. The Learner will be required to successfully complete each Work Experience for at least 2 weeks under supervision before operating independently for a further 2 weeks.

The learning contact time which constitutes the total amount of time during which the learner needs to have access to the workplace to enable him or her to acquire the knowledge and understanding specified for this module is 17.5 days after which the assessment may take place.

The learner will be required to:

- WM-03-WE01: Sell products using the sales cycle
- WM-03-WE02: Use advanced selling techniques

#### **3.2 Guidelines for Work Experiences**

##### **3.2.1. WM-03-WE01: Sell products using the sales cycle**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Approach the customer in line with organisational standards
- WA0102 Qualify the customer's needs using questioning techniques
- WA0103 Demonstrate the product in line with organisational standards highlighting product features, advantages and benefits
- WA0104 Link the product benefits to the customer's buying needs
- WA0105 Overcome objections in line with organisational standards
- WA0106 Use closing techniques to close the sale in line with organisational standards
- WA0107 Demonstrate providing after sales service in line with organisational standards

##### ***Supporting Evidence***

- SE0101 Documentary evidence confirming that the learner has complied with organisational procedures when approaching the customer, qualifying the customer's needs, demonstrating the product, linking the product benefits to the customer's needs, overcoming objections, closing the sale and providing after sales service, authenticated by the learner's supervisor, for at least five (5) customers
- SE0102 Documentary evidence confirming the sale for at least five (5) customers served where the sales cycle was demonstrated, signed off by the learner's supervisor
- SE0103 Documentary evidence from the learner, evaluating the reasons for an unsuccessful sale

### **3.2.2. WM-03-WE02: Use advanced selling techniques**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Sell add-on products or supplementary services in line with organisational standards
- WA0202 Use selling up techniques or offer alternative products in line with organisational standards
- WA0203 Prospecting new customers in line with organisational processes and procedures

#### ***Supporting Evidence***

- SE0201 Documentary evidence that the learner has sold add-on products or supplementary services (such as extended warranties, extended guarantees, product protection products, insurance, deliveries or installations), for at least five (5) customers served, signed off by the learner's supervisor
- SE0202 Documentary evidence confirming that selling up techniques or offering alternative products have been used with two (2) customers served, signed off by the learner's supervisor
- SE0203 Documentary evidence confirming that the learner has prospected at least five (5) new customers in line with organisational processes and procedures

### **3.3 Contextualised Workplace Knowledge**

1. Organisational standards for selling products to customers using the sales cycle
2. Organisational policies and procedures for selling using the sales cycle
3. Organisational policies and procedures for providing after sales service
4. Organisational policies and procedures for providing add-on sales
5. Organisational policies and procedures for providing supplementary services including extended warranties, extended guarantees, product protection products, insurance, deliveries or installations
6. Organisational policies and procedures for selling up or offering alternative products
7. Organisational policies and procedures for prospecting for new customers

### **3.4 Criteria for Workplace Approval**

#### ***Physical Requirements:***

- Operational wholesale or retail store selling products to customers in a full service sales environment.

#### ***Human Resource Requirements:***

- Supervisor/Manager with at least 1 year experience in sales

#### ***Legal Requirements:***

- Registered as a formal business

- Compliant with all relevant legal requirements for a wholesale or retail store

### **3.5 Additional Assignments to be Assessed Externally**

All evidence produced relating to the following workplace experience must be submitted for external assessment. Sell products using the sales cycle, Use advanced selling techniques.

#### SECTION 4: STATEMENT OF WORK EXPERIENCE

<b>Curriculum Number:</b>	522301001
<b>Curriculum Title:</b>	Retail Sales Advisor

Learner Details	
<b>Name:</b>	
<b>ID Number:</b>	

Employer Details	
<b>Company Name:</b>	
<b>Address:</b>	
<b>Supervisor Name:</b>	
<b>Work Telephone:</b>	
<b>E-Mail:</b>	

**522301001-WM-01: Processes and procedures for attending to different types of customers, handling customer queries and communicating with customers, NQF Level 2, Credits 10**

WM-01-WE01	Attend to different types of customers		
	<b>Scope Work Experience</b>	Date	Signature
WA0101	Greet customers appropriately according to organisational standards		
WA0102	Acknowledge unattended customers		
WA0103	Communicate with customers in a verbal and non-verbal manner		
	<b>Supporting Evidence</b>	Date	Signature
SE0101	Documentary evidence confirming that the learner has greeted a variety of customers in line with organisational standards, signed off by the learner's supervisor		
SE0102	Documentary evidence confirming that the learner has acknowledged a variety of unattended customers in line with organisational standards, signed off by the learner's supervisor		
SE0103	Documentary evidence confirming that the learner has communicated verbally and non-verbally with a variety of customers in line with organisational standards, signed off by the learner's supervisor		
WM-01-WE02	Handle a variety of customer queries in the outlet		
	<b>Scope Work Experience</b>	Date	Signature
WA0201	Apply active listening skills when handling customer queries		
WA0202	Handle a variety of customer queries in line with organisational processes and procedures		
WA0203	Escalate queries in line with organisational processes and procedures		
	<b>Supporting Evidence</b>	Date	Signature

SE0201	Documentary evidence confirming the learner has listened to the customer and understood their query when handling customer queries, signed off by the learner's supervisor		
SE0202	Documentary evidence confirming the learner has followed organisational processes and procedures when handling a variety of customer queries for at least four (4) queries, signed off by the learner's supervisor		
SE0203	Documentary evidence confirming that the learner has appropriately escalated queries they cannot solve in line with organisational requirements, signed off by the learner's supervisor		

	<b>Contextualised Workplace Knowledge</b>	Date	Signature
1	Organisational standards for attending to a variety of customers in a wholesale or retail environment		
2	Organisational policies and procedures for communicating with customers		
3	Organisational policies and procedures for handling a variety of customer queries		
4	Organisational policies and procedures for escalating customer queries		
5	Organisational store layout		
6	Organisational policies and procedures for handling product availability queries		
7	Organisational policies and procedures for directing customers to different departments within an outlet		
8	Organisational customer service standards		

	<b>Additional Assignments to be Assessed</b>	Date	Signature

	<b>Externally</b>		
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**522301001-WM-02, Processes and procedures for providing customer service, NQF Level 3, Credits 8**

WM-02-WE01	Provide service to customers		
	<b>Scope Work Experience</b>	Date	Signature
WA0101	Promote a positive and professional image and greet customers in line with organisational standards		
WA0102	Provide customer service to a variety of customers including finding the product or offering alternative products in line with organisational standards		
	<b>Supporting Evidence</b>	Date	Signature
SE0101	Documentary evidence confirming that the learner has promoted a positive and professional image and has greeted customers in line with organisational standards		
SE0102	Documentary evidence confirming that the learner has provided customer service to a variety of customers in line with organisational standards including finding the right product or offering alternative products, signed off by the learner's supervisor		
SE0103	A checklist designed by the learner detailing all aspects required to promote a positive and professional image in line with organisational standards, signed off by the learner's supervisor		
WM-02-WE02	Enhance customer relationships		
	<b>Scope Work Experience</b>	Date	Signature
WA0201	Use organisational customer loyalty programmes or additional services to enhance customer relationships		
WA0202	Re-serving or maintaining existing customer relationships in line with organisational processes and procedures		



WA0203	Give the customer a final greeting that encourages the customer to return to the store		
	<b>Supporting Evidence</b>	Date	Signature
SE0201	Documentary evidence confirming that the learner has offered customer loyalty programmes or additional services according to organisational policies and procedures for at least five (5) customer interactions, signed off by the learner's supervisor		
SE0202	Documentary evidence confirming that the learner has re-served or maintained at least five (5) existing customers in line with organisational processes and procedures.		
SE0203	Documentary evidence confirming that the learner has given the customer a final greeting that encourages the customer to return to the store for at least five (5) customer interactions		

	<b>Contextualised Workplace Knowledge</b>	Date	Signature
1	Organisational policies and procedures for building customer relationships in a full or partial service sales environment		
2	Organisational policies and procedures for re-serving and maintaining existing customers		
3	Organisational policies and procedures for promoting customer loyalty programmes		
4	Organisational policies and procedures for promoting additional customer services		
5	Organisational policies and procedures for promoting a positive and professional image in the workplace		
6	Organisational policies and procedures for housekeeping		

	<b>Additional Assignments to be Assessed Externally</b>	Date	Signature
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**522301001-WM-03, Processes and procedures for selling products to customers using the sales cycle and advanced selling techniques in a full service wholesale or retail sales environment, NQF Level 03, Credits 14**

WM-03-WE01	Sell products using the sales cycle		
	<b>Scope Work Experience</b>	Date	Signature
WA0101	Approach the customer in line with organisational standards		
WA0102	Qualify the customer's needs using questioning techniques		
WA0103	Demonstrate the product in line with organisational standards highlighting product features, advantages and benefits		
WA0104	Link the product benefits to the customer's buying needs		
WA0105	Overcome objections in line with organisational standards		
WA0106	Use closing techniques to close the sale in line with organisational standards		
WA0107	Demonstrate providing after sales service in line with organisational standards		
	<b>Supporting Evidence</b>	Date	Signature
SE0101	Documentary evidence confirming that the learner has complied with organisational procedures when approaching the customer, qualifying the customer's needs, demonstrating the product, linking the product benefits to the customer's needs, overcoming objections, closing the sale and providing after sales service, authenticated by the learner's supervisor, for at least five (5) customers		
SE0102	Documentary evidence confirming the sale for at least five (5) customers served where the sales cycle was		

	demonstrated, signed off by the learner's supervisor		
SE0103	Documentary evidence from the learner, evaluating the reasons for an unsuccessful sale		
WM-03-WE02	Use advanced selling techniques		
	<b>Scope Work Experience</b>	Date	Signature
WA0201	Sell add-on products or supplementary services in line with organisational standards		
WA0202	Use selling up techniques or offer alternative products in line with organisational standards		
WA0203	Prospecting new customers in line with organisational processes and procedures		
	<b>Supporting Evidence</b>	Date	Signature
SE0201	Documentary evidence that the learner has sold add-on products or supplementary services (such as extended warranties, extended guarantees, product protection products, insurance, deliveries or installations), for at least five (5) customers served, signed off by the learner's supervisor		
SE0202	Documentary evidence confirming that selling up techniques or offering alternative products have been used with two (2) customers served, signed off by the learner's supervisor		
SE0203	Documentary evidence confirming that the learner has prospected at least five (5) new customers in line with organisational processes and procedures		

	<b>Contextualised Workplace Knowledge</b>	Date	Signature
1	Organisational standards for selling products to customers using the sales cycle		
2	Organisational policies and procedures for selling using the sales cycle		

3	Organisational policies and procedures for providing after sales service		
4	Organisational policies and procedures for providing add-on sales		
5	Organisational policies and procedures for providing supplementary services including extended warranties, extended guarantees, product protection products, insurance, deliveries or installations		
6	Organisational policies and procedures for selling up or offering alternative products		
7	Organisational policies and procedures for prospecting for new customers		

	<b>Additional Assignments to be Assessed Externally</b>	Date	Signature
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