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**RETAIL SALES ADVISOR**

**Aligned with Curriculum 522301001**

**PRACTICAL EXPERIENCE LOG**

**Retail sales advisor**

**Curriculum 522301001**

**Practical experience**

**Practical skills modules**

522301001-PM-01, Interact with different types of customers and present a positive image

522301001-PM-02, Handle customer queries and complaints

522301001-PM-03, Provide customer service and build customer relationships

522301001-PM-04, Sell products to customers using the sales cycle

522301001-PM-05, Use advanced selling techniques

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| **Company** |  |
| **Learner name & surname** |  |
| **Learner ID number** |  |
| **Learner signature** |  |
| **Line manager name & surname** |  |

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| 1 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

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| 2 Criteria for practical skills training provider approval |

## 2.1 Physical requirements

Should a workplace not have all the necessary physical requirements they are allowed to enter into formal agreements with other workplaces that do have the required list of physical requirements in order to achieve accreditation.

Specific physical requirements, human resources requirements and legal requirements are listed under the relevant practical skills requirements.

## 2.2 Requirements for practical training evidence

All evidence produced relating to the practical training must be submitted for external assessment. That means, this guide and log must be fully completed by learners and submitted as part of their evidence of practical training before the External Integrated Summative Assessment (EISA).

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| 3 Practical training requirements |

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| **NOTE:** The practical assignments in this practical training guide and log are written for retail sales advisors employed at a wholesale or retail chain store company. If the instruction requires the learner to perform a task relating to “the wholesale or rerail outlet where you are employed” and the learner is not currently employed, such learner should complete the activity at or relating to the store with which the learner has an agreement for workplace training and experience.  If the practical training is conducted by the training institution (and not the workplace), learners need to be informed in advance what information they need to bring for the contact sessions in order to complete the practical assignments. |

## 3.1 PM-01 Interact with different types of customers and present a positive image

### 3.1.1 PM-01-PS01: Greet different types of customers telephonically

#### 3.1.1.1 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

#### 3.1.1.2 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

#### 3.1.1.3 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

### 3.1.2 PM-01-PS02: Approach different types of customers face-to-face

#### 3.1.2.1 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

#### 3.1.2.2 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

#### 3.1.2.3 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

### 3.1.3 PM-01-PS03: Present a professional and positive image

#### 3.1.3.1 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

#### 3.1.3.2 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

#### 3.1.3.3 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

#### 3.1.3.4 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

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

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 able to:

* PM-02-PS01 Handle customer queries
* PM-02-PS-02 Handle customer complaints

### 3.2.1 PM-02-PS01: Handle customer queries

#### 3.2.1.1 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

#### 3.2.1.2 Applied Knowledge

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

***3.2.1.3 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

### 3.2.2 PM-02-PS02: Handle customer complaints

#### 3.2.2.1 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

***3.2.2.2 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

***3.2.2.3 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

#### 3.2.2.4 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

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

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

### 3.3.1 PM-03-PS01: Provide customer service to internal customers

#### 3.3.1.1 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

***3.3.1.2 Applied Knowledge***

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

***3.3.1.3 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

### 3.3.2 PM-03-PS02: Provide customer service to external customers

#### 3.3.2.1 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

#### 3.3.2.2 Applied Knowledge

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

#### 3.3.2.3 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

### 3.3.3 PM-03-PS03: Provide after sales service

#### 3.3.3.1 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

#### 3.3.3.2 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

#### 3.3.3.3 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

### 3.3.4 PM-03-PS04: Enhance customer relationships

#### 3.3.4.1 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

#### 3.3.4.2 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

#### 3.3.4.3 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

#### 3.3.4.4 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

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| 4 Criteria for practical skills training approval |

## 4.1 Physical requirements

Should a workplace not have all the necessary physical requirements they are allowed to enter into formal agreements with other workplaces that do have the required list of physical requirements in order to achieve accreditation.

## 4.2 Requirements for practical training evidence

All evidence produced relating to the following practical training must be submitted for external assessment.

**142103001-PM-01 Manage retail chain store employee performance**

* Communicate in a retail environment
* Manage meeting processes
* Manage people dynamics
* Evaluate employee performance

**142103001-PM-02 Manage retail chain store operational processes**

* Manage retail chain store operational processes
* Manage and control work processes

**142103001-PM-03 Manage retail chain store service standards**

* Plan and control housekeeping activities
* Plan and control health and safety activities
* Determine customer service requirements and plan to achieve these requirements

**142103001-PM-04 Maintain effective retail chain store stakeholder relations**

* Maintain effective relations with stakeholders within the organisation
* Maintain effective relations with stakeholders external to the organisation

**142103001-PM-05 Manage stock control in a retail chain store**

* Manage operational tasks impacting on the management of stock balances
* Manage under, over and dead stock situations

**142103001-PM-06 Propose improvements to a retail chain store’s range and layout**

* Propose improvements to range and product mix
* Propose improvements to layouts

**142103001-PM-07 Implement plans to improve sales in a retail chain store**

* Break up budgets and set individual targets
* Merchandise promotional product and display ticketing

**142103001-PM-08 Implement plans to improve a retail chain store’s financial performance**

* Analyse and interpret chain store financial performance reports
* Plan corrective actions to improve financial performance

**142103001-PM-09 Manage risk and maintain assets in retail chain store**

* Identify and assess areas of risk in a retail chain store
* Manage the reduction of shrinkage and losses
* Manage assets

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| 5 Practical training |

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| **NOTE:** The practical assignments in this practical training guide and log are written for chain store managers employed at a retail chain store. If the instruction requires the learner to perform a task relating to “the chain store you manage” and the learner is not currently employed, such learner should complete the activity at or relating to the store with which the learner has an agreement for workplace training and experience.  If the practical training is conducted by the training institution (and not the workplace), learners need to be informed in advance what information they need to bring for the contact sessions in order to complete the practical assignments. |