

**RETAIL SALES ASSISTANT**

**Aligned with Curriculum 522301001**

**WORKBOOK**

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**WORKBOOK**

**Module 1**

**Retail Sales Assistant**

Aligned with

Qualification 522301001 Retail sales assistant

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

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

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| A close up of a sign  Description automatically generated | **Activity 1: The company’s customers (KM01-IAC0101)**  Please complete this activity in your Workbook.  1.1 Who are your company’s customers?  1.2 What makes them customers?  1.3 Is anybody within your company a customer of the company? |

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| A close up of a sign  Description automatically generated | **Activity 2: (KM01-IAC0102)**  Please complete this activity in your Workbook.  2.1 Have you ever been ***in a hurry*** when buying from a shop? What did you expect in the situation?   * Did you get what you expected? * How did that make you feel? * Will you buy from the same store again? * Have you ever noticed a customer who was in a hurry? How did he or she behave? * What do you think they expected? * How did you feel?   2.2 Give an example of a situation where you as customer said to a sales assistant that you were ***just looking around***. What were you really considering?   * Why did you say you were just looking and not tell the person what you wanted or needed? * Give an example of a situation where you approached a customer and he or she said they were just looking. Why do you think they said they were just looking? * How did that make you feel? * How did you handle the situation? * Did your action result in a sale? Why or why not? * What do you think the customer wanted or needed?   2.3 Describe a situation where a customer was ***excited*** about a product. How did he or she behave?   * How did you respond to the customer? Did you build positive relations with the customer?   2.4 Describe a situation where you encountered a ***potential customer***. What did the customer want or need?   * How did he or she behave? * How did you deal with the situation? * Did your actions result in a sale? * Was the customer satisfied?   2.5 From your answers to questions 2.1 to 2.4, make a list of acceptable ways of responding to customers. |

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| A close up of a sign  Description automatically generated | **Activity 3 (KM01-IAC0102)**  Please complete the activity in your workbook.  Write a new, brief, introduction that you will now use when approaching unattended customers.  ***The key elements of your new introduction are:***   1. Your name 2. How you can help them (Experience, qualifications, etc.) 3. An open question to start the conversation. |

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| A close up of a sign  Description automatically generated | **Activity 4: First impressions and last impressions (KM01-IAC0201)**  Please complete the activity in your Workbook.  4.1 Describe a situation when you got a very good first impression of a store.  4.2 Describe a situation when you got a very bad first impression of a store.  4.3 Describe a situation when you left a store with a very good last impression.  4.4 Describe a situation when you left a store with a very bad last impression.  4.5 Use your answers in questions 4.1 to 4.4 to complete the map below.    4.6 Draw a happy face next to the situations that were pleasant and an unhappy face next to the situations that caused dissatisfaction. |

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| A close up of a sign  Description automatically generated | **Activity 5: Personal appearance**  Please complete the activity in your Workbook.  Draw up a checklist of all the organisational requirements for personal appearance, including aspects such as clothes, shoes, hair style, jewellery, etc. so that you can use this checklist to check your own personal appearance. |

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| A close up of a sign  Description automatically generated | **Activity 6: Housekeeping**  Please complete the activity in your Workbook.  Prepare a checklist to use every day to check that all housekeeping standards for which you are responsible in the sales area are maintained according to your organisation’s procedures and requirements. List the housekeeping standards that are applied in your workplace for the area in which you work.  A checklist typically has space for a date and the name of the person who did the checking. It also has a column in which to indicate whether the standard was met (Yes/no) and for comments. In the comments column the person who does the checking should make notes of any action that was taken to correct problems. |

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| A close up of a sign  Description automatically generated | **Activity 7: (KM01-IAC0303)**  Work in groups and complete the activity in your workbook.  7.1 List impressions of negative non-verbal communication (body language) when you visited a wholesale or retail store.  7.2 From your responses to the above, draw up a list of principles of non-verbal communication in a wholesale or retail store (for example, the impact of non-verbal communication on customers and what to do and not to do). |

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| A close up of a sign  Description automatically generated | **Activity 8: (KM01-IAC0302)**  Please complete the activity in your workbook. Work in small groups.  8.1 Why is it important that sales advisors use professional language? List benefits of using professional language in a sales environment and list possible consequences of not using professional language in a sales environment.  8.2 Draw up a table with two columns. In the first column, give examples of professional language or terms. In the second column, list examples of unprofessional language or terms in a sales environment. |

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| A close up of a sign  Description automatically generated | **Activity 9: (KM01-IAC0304)**  Please complete the activity in your workbook.  Recall a situation where you were not being listened to. Answer the following questions relating to that situation.  9.1 What was it that made you realise that you were not being listened to?  9.2 How did you feel about not being listened to?  9.3 Did you believe that the other person understood you? Motivate your answer.  9.4 What would you have liked the other person to do to show that they were really listening to you? |

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| A close up of a sign  Description automatically generated | **Activity 10: (KM01-IAC0305)**  Please complete the activity in your workbook.  Draw a mind map to list and explain the principles of telephone etiquette.  NOTE: On a mind map for this activity, you will draw 4 branches to list the four principles. You will then, on each of these 4 branches, draw more branches to explain the principle. The concept of a mind map is illustrated below. |

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| A picture containing plate, window  Description automatically generated | **Activity 11: (KM01-IAC0401)**  Work in groups and complete the activity in your workbooks.  11.1 List and discuss typical customer queries you receive at the stores where you are employed.  11.2 List the four types of customer queries received most often. |

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| A picture containing plate, window  Description automatically generated | **Activity 12: (KM01-IAC0402)**  Work in groups and complete the activity in your workbooks.  12.1 Discuss situations where queries you were not satisfied with the manner in which your queries at a wholesale or retail store were handled.  12.2 Explain how the responses – or lack of response – affected your behaviour as a customer.  12.3 Discuss situations where you were very satisfied with how your queries at a wholesale or retail store were handled.  12.4 Explain the effect this had on you as customer.  12.5 Use your answers in the previous questions in this activity to explain why it is important to respond effectively to customer queries. Do this by drawing up a table with two columns, in which you write down (i) the consequences if customer queries are not handled effectively, and (ii) the benefits of handling customer queries effectively. |

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| A picture containing plate, window  Description automatically generated | **Activity 13: (KM01-IAC0403)**  Work in groups and complete the activity in your workbooks.  13.1 Discuss situations where you were not satisfied with a response you received when you asked a question to a sales advisor.  13.2 From the information you gathered in your discussion, write down ways in which a sales advisor should respond to customer queries. |

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| A picture containing plate, window  Description automatically generated | **Activity 14:**  Work in small groups and complete the activity in your workbooks.  14.1 Make a list of the types of complaints you receive from customers.  14.2 Categorise the types of complaints into (i) Product complaints and (ii) Service complaints.   |  |  | | --- | --- | | **Product complaints** | **Service complaints** | |  |  | |

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| A close up of a sign  Description automatically generated | **Activity 15: (KM01-IAC0501)**  Please complete the activity in your workbook.  Draw a flowchart to explain the typical steps in handling customer complaints. The flowchart should contain a block for each step, with bullet points under the block to explain the step.  **Example**: |

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| A close up of a sign  Description automatically generated | **Activity 16:**  Please complete the activity in your Workbook.  Make a list of possible product or service delivery problems. For each type of problem, indicate which internal or external resources should be involved.   |  |  | | --- | --- | | **Complaints** | **Resources that should be involved** | |  |  | |

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| A close up of a sign  Description automatically generated | **Activity 17 (KM01-IAC0505):**  Work in a group of three, taking turns to play the three roles:   * A complaining customer * The employee responding to the complaint * An observer, whose role is to observe and give feedback.   The employee needs to contact an external resource to help resolve a customer complaint. Decide on the situation – what is the complaint about? You can use your imagination or think of a situation you have come across in real life. Once you have an idea, act it out without rehearsing it. Use your experience and the guidelines you have been given in this Learner’s guide. |

**WORKBOOK**

**Module 2**

**Retail Sales Assistant**

Aligned with

Qualification 522301001 Retail sales assistant

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

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| **Company** |  |
| **Learner name & surname** |  |
| **Learner ID number** |  |
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| A picture containing plate, window  Description automatically generated | **Activity 18 (KM02-IAC0102; KM02-IAC0103 and KM01-IAC0104):**  Work in groups.  18.1 Explain the similarities between self-service, partial service and full-service wholesale and retail outlets.  18.2 Explain the differences between self-service, partial service and full-service wholesale and retail outlets.  18.3 Explain what customer service is expected in the following types of service environment:   |  |  |  | | --- | --- | --- | | **Self-service** | **Partial service** | **Full service** | |  |  |  | |

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| A close up of a sign  Description automatically generated | **Activity 19 (KM02-IAC0203):**  Work in groups.  Explain the customer service cycle in your own words and give an example for each step in the cycle.   |  |  |  | | --- | --- | --- | | **Step in the customer service cycle** | **Explanation** | **Example of how you would do it** | |  |  |  | |

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| A close up of a sign  Description automatically generated | **Activity 20 (KM02-IAC0201):**  Explain the difference between customer service and excellent customer service by giving practical examples from your workplace.   |  |  | | --- | --- | | **Customer service: Attending to customers** | **Examples:** | | **Service excellence: delivering what is promised and dealing well with problems or queries** | **Examples of delivering what is promised:**  **Examples of dealing well with problems or queries:** | |

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| A close up of a sign  Description automatically generated | **Activity 21 (KM02-IAC0204 and KM02-IAC0205):**  Explain the impacts of good customer service and poor customer service on sales by completing the diagramme |

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| A close up of a sign  Description automatically generated | **Activity 22 (KM02-IAC0207):**  For each right of consumers listed in the table below explain the duties of the customer in terms of the Consumer Protection Act.   |  |  | | --- | --- | | **Consumer’s right** | **Duties of the sales advisor** | | A consumer may examine goods before he or she pays. Consumers, therefore, have a right to look at products. Where there is a chance that a product may be damaged, retailers often display notices for customers to ask a sales advisor for assistance. |  | | A supplier must show the price, label and/or trade description of the goods on his/her packaging. The content may not be misleading. |  | | A consumer must receive a quote or breakdown of his or her financial obligations before entering into an agreement with a supplier, for example, before a credit agreement is entered into. |  | | A supplier may not use force or manipulate a consumer to enter into an agreement, or to pay for goods or services. |  | | A consumer has the right to a receipt after paying for goods or services. |  | | A consumer is entitled to a copy of any agreement between the retailer and the consumer. |  | | A retailer may not accept money from a consumer if the retailer is not able to supply goods or services as a result of insufficient stock or incapacity to render a service. A consumer must be refunded any amount paid plus interest and compensate the consumer for all costs incurred as a result of the retailers overselling. |  | | The representation or marketing of goods or services may not be misleading or false. |  | | If the goods bought from a retailer are defective (not suitable for its usual purpose or for the purpose it was bought, of poor quality and bad working order, or not useable or durable), a consumer has 6 months from the date of delivery to return the goods to the supplier, at the retailer’s risk and expense. At the consumer’s choice, the retailer must fix, replace or refund the goods bought by the consumer. |  | |

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| A close up of a sign  Description automatically generated | **Activity 23 (KM02-IAC0307):**  Using the information above, and any other impacts that you know of, draw a diagram to explain the influence that the customer’s experience has on future business.  You may add more arrows. |

**WORKBOOK**

**Module 3**

**Retail Sales Assistant**

Aligned with

Qualification 522301001 Retail sales assistant

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

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

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| A close up of a sign  Description automatically generated | **Activity 24 (KM03-IAC0102; KM03-IAC0103):**  Arrange a meeting and discuss with your supervisor or manager, then record the answers to the following:  24.1 How does the supervisor or manager explain the difference between team and personal sales target at the outlet where you are employed?  Give an example of a team sales target and a personal sales target.  24.2 Explain the ways in which the sales team you belong to plan to achieve sales targets through:   * Commitment * Self-motivation * Self-management |

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| A picture containing plate, window  Description automatically generated | **Activity 25 (KM03-IAC0102; KM03-IAC0103):**  Discuss in groups.  25.1 Explain what a sales target is.  25.2 Explain the impact of sales targets.  25.3 Explain the difference between a team sales target and a personal sales target and give examples. |

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| A picture containing plate, window  Description automatically generated | **Activity 26 (KM03-IAC0201):**  Discuss in groups.  In small groups, discuss and explain ways for preparing for sales:  How can you acquire product knowledge?  How can you gather information about customers?  How can you ensure the sales area is conducive to effective selling?  ***Your answers should add*** ***(expand on)*** to the information in Figure 10 to enable you to fully answer a question about preparing for sales. |

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| A close up of a sign  Description automatically generated | **Activity 27 (KM03-IAC0203):**  In your own words and with your own examples, describe how you would approach the following customers:  The customer who walks around the shop and says she is just looking what is in the store.  A customer who avoids eye contact with you.  A customer who walks around fast, seeming to be in a hurry.  A customer who casually handles flower vases. |

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| A picture containing plate, window  Description automatically generated | **Activity 28 (KM03-IAC0207):**  Group activity  28.1 Identify – from sales brochures or pamphlets, or from knowledge of our outlet’s products – two products of the same type. From the product features given (and your own knowledge of the type of product), prepare a list of the types of questions you can ask to establish the customer’s needs.   |  |  | | --- | --- | | **Product** | **Features** | |  |  |   28.2 How would you link each feature to a benefit? |

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| A picture containing plate, window  Description automatically generated | **Activity 29 (KM03-IAC0302):**  Work in small groups.  29.1 List 5 products sold by the stores where you are employed.  29.2 For every product, brainstorm add-on products that the sales advisor can offer customers. |

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| A close up of a sign  Description automatically generated | **Activity 30 (KM03-IAC0303):**  Explain the impact of selling up and add-on sales on the business and on the customer by completing the diagram. |

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| A picture containing plate, window  Description automatically generated | **Activity 31 (KM03-IAC0304):**  Work in small groups  On a sheet of flipchart paper, draw a table with 3 columns and 3 rows.  In the first column, list three products sold at the stores where you are employed. Next to each product, summarise the need that the product will meet) that is, a feature of the product. In the third column, write down an alternative product that will meet the customer’s need.   |  |  |  | | --- | --- | --- | | **Product** | **Feature** | **Alternative product** | |  |  |  | |