**RETAIL SALES ADVISOR**

**Aligned with Qualification 99669 Retail Sales Advisor**

**ASSESSMENT GUIDE**

A picture containing text, indoor, person

Description automatically generated

**This Assessment Guide must be stored securely.**

**It should only be made available to Facilitators, Assessors and Moderators   
for this programme.**

**Under no circumstances should it be made available — in any format whatsoever —   
to learners or other unauthorised persons.**

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| 1 About this Assessment Guide |

* 1. The purpose of this guide is to provide the Assessor with guidelines on the assessment of the knowledge component and practical component.
  2. This Assessment guide must be read and used in conjunction with the Facilitator’s guide (containing model answers/guidelines for formative activities), as well as the Assessment strategy policy and process of the Training provider.
  3. This Assessment guide is for the ***confidential*** use by Assessors.

1.5 This document contains the following:

* Assessment Plan and Preparation
* Model answers for knowledge tests
* Assessment Review

1.6 Portfolio checklist

Please refer to the Portfolio guide – a Portfolio checklist is included that must be completed by the learner and checked by the assessor as a quality assurance tool.

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| 2 Assessment principles |

The Assessor should ensure that the principles of assessment are applied in all assessments conducted.

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| **No.** | **Principles** | **Description** |
| 1. | Fair | The method chosen to assess the achievements must be fair and must not present any barriers that are not related to the evidence. |
| 2. | Systematic | The assessment must be planned and recorded to ensure that the assessment is fair. |
| 3. | Appropriate | The method of assessment is suited for the performance being assessed. |
| 4. | Manageable | The methods used must be accessible, cost-effective and must not interfere with the learning. |
| 5. | Time efficient | Ensure that the assessment does not interfere with the normal daily activities or productivity of the candidate. |
| 6. | Open | The candidate must contribute to the planning and collecting of evidence. The candidate must understand the assessment process and the criteria used. |
| 7. | Consistent | The same assessor must make the same judgement under the same or similar circumstances. |

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| 3 Qualification document and curriculum |

## 3.1 Qualification

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| --- | --- | --- | --- | --- |
| **SAQA QUAL ID** | **QUALIFICATION TITLE** | | | |
| 99669 | Occupational Certificate: Sales Assistant (General) (Retail Sales Advisor) | | | |
| **ORIGINATOR** | | | | |
| Development Quality Partner - W&RSETA | | | | |
| **PRIMARY OR DELEGATED QUALITY ASSURANCE FUNCTIONARY** | | | **NQF SUB-FRAMEWORK** | |
| - | | | OQSF - Occupational Qualifications Sub-framework | |
| **QUALIFICATION TYPE** | **FIELD** | | **SUBFIELD** | |
| Occupational Certificate | Field 11 - Services | | Wholesale and Retail | |
| **ABET BAND** | **MINIMUM CREDITS** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **QUAL CLASS** |
| Undefined | 54 | Not Applicable | NQF Level 03 | Regular-ELOAC |
| **REGISTRATION STATUS** | | **SAQA DECISION NUMBER** | **REGISTRATION START DATE** | **REGISTRATION END DATE** |
| Reregistered | | SAQA 06120/18 | 2018-07-01 | 2023-06-30 |
| **LAST DATE FOR ENROLMENT** | | **LAST DATE FOR ACHIEVEMENT** | | |
| 2024-06-30 | | 2027-06-30 | | |

In all of the tables in this document, both the pre-2009 NQF Level and the NQF Level is shown. In the text (purpose statements, qualification rules, etc), any references to NQF Levels are to the pre-2009 levels unless specifically stated otherwise.

This qualification does not replace any other qualification and is not replaced by any other qualification.

**PURPOSE AND RATIONALE OF THE QUALIFICATION**

**Purpose:**

The purpose of this qualification is to prepare a learner to operate as a Retail Sales Advisor.

A Retail Sales Advisor sells goods and services such as Fast Moving Consumer Goods (FMCG), clothing, furniture, and speciality merchandise in a retail or wholesale environment.

A qualified learner will be able to:

* Attend to different types of customers and resolve queries.
* Provide customer service and build customer relationships.
* Sell products in a full-service retail and wholesale sales environment.

Rationale:

In the Wholesale and Retail sector, the position of a Sales Assistant is critical to the functioning of the business, as money coming into the business comes through sales. The Sales Assistant also builds relationships with customers, encouraging future sales and referrals.

More specifically, there are two roles that are relevant to this occupational code within the Wholesale and Retail sector. The first is a Sales Assistant, who interacts with customers, responds to queries and provides customer service in both a partial and a full-service retail environment. The second is a Retail Sales Advisor, who actively leads customers through the sales cycle and guides them to make the buying decision for products that meet their needs in addition to interacting with them and providing customer service.

There is therefore a great necessity for a qualification that develops the skills and knowledge needed by not only addresses the skill needs of the Sales Assistant, but one that a Sales Assistant seeking to progress to a position of a retail Sales Advisor.

The industry is in need of qualified people to fill these roles. Accordingly, the qualification is vital as is evident by the large number of Sales Assistants and Retail Sales Advisors employed in the industry. The National Certificate in Wholesale and Retail Operations (NQF Level 3) which this qualification provided individuals in the sales assistant position with a broad view of the occupation and did not specifically cater for a Sales Assistant or a Retail Sales Advisor.

The Wholesale and Retail sector has identified the Sales Assistant (Retail Sales Advisor) qualification as one which is critical for the development of the Retail and wholesale sectors. This has been supported by a variety of stakeholders from all regions through their participation in monthly stakeholder forums.

Those who can benefit from this qualification include a Sales Assistant in a retail or wholesale store and a Retail Sales Advisor in a full-service retail store. This qualification will not only benefit the learners completing it, but also society and the economy as wholesale and retail businesses will be able to function more effectively with trained staff members. Staff will be developed who have the knowledge, skills and work experience to sell the products to customers that meet their buying needs, to reduce unnecessary returns, that is returns which incur losses to the business whilst also promoting service excellence.

Sales mean income to a wholesale or retail business. Skilled employees who are able to increase this income generation and improve the image of the business will be able to contribute to the profitability of these businesses. This qualification will also help to reduce the unemployment levels in the South African job market as more qualified Sales Assistants and Retail Sales Advisors will be qualified.

**LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING**

**Recognition of Prior Learning (RPL):**

RPL for access to the external integrated summative assessment: Accredited providers and approved workplaces must apply the internal assessment criteria specified in the related curriculum document to establish and confirm prior learning. Accredited providers and workplaces must confirm prior learning by issuing a statement of result or certifying a work experience record.

RPL for access to the qualification: Accredited providers and approved workplaces may recognise prior learning against the relevant access requirements.

**Entry Requirements:**

* NQF Level 1 with Mathematics and Communication.

**RECOGNISE PREVIOUS LEARNING?**

Y

**QUALIFICATION RULES**

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

**Knowledge Modules:**

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

Total number of credits for Knowledge Modules: 11.

**Practical Skills Modules:**

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

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, Level 2, 10 Credits.
* 522301001-WM-02: Processes and procedures for providing customer service, Level 3, 8 Credits.
* 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, Level 03, 14 Credits.

Total number of credits for Work Experience Modules: 32.

**EXIT LEVEL OUTCOMES**

1. Attend to customers and handle their queries.
2. Build relationships with customers by providing quality service.
3. Sell goods or services to customers.

**ASSOCIATED ASSESSMENT CRITERIA**

**Associated Assessment Criteria for Exit Level Outcome 1:**

* The generally accepted ways of greeting and acknowledging diverse customers in order to promote customer service and create a positive first impression are explained.
* The way in which different types of customers encountered in a wholesale and retail environment should be handled is explained with examples appropriate to the scenarios given.
* The impact that personal appearance, grooming, the use of professional language and housekeeping has on the customer is explained in terms of the image of the sales assistant and the store.
* Responses to customer queries on product location, stock availability and promotions are appropriately made and information given in regard to the query.

**Associated Assessment Criteria for Exit Level Outcome 2:**

* The importance of acknowledging customers waiting for service is explained in terms of its impact on customer service, sales and the image of the store.
* The impact that good and poor service has on sales in a business is explained in terms of its effect on getting customers to return to the store.
* Suggestions to build relationships with customers are given for situations where the customer is dissatisfied with the service received in the past and also in cases where customers are happy with the service received so as to motivate them to recommend the store to others.

**Associated Assessment Criteria for Exit Level Outcome 3:**

* The sale process of a sales advisor in a visual or written scenario is evaluated in terms of the approach, questioning techniques used, the presentation of the product, meeting the customer's buying needs, overcoming the customer's objections, and closing the sale and where incorrect, the correct action is suggested appropriate to the scenario.
* The ways that customers could be approached are described using examples that are correct in terms of the scenario given.
* The manner in which a customer is approached to engage the customer and starts the sales process is demonstrated.
* The customer is questioned in a manner that results in the sales advisor identifying the buying needs.
* The product is demonstrated to the customer in a manner where features, advantages, and benefits are linked to the buying motive or customers buying needs.
* Objections are dealt with in a manner that results in the sale being positively closed.
* The sale is closed.
* The use of advanced selling skills including selling add-on products, selling up, selling alternative products or selling supplementary services is demonstrated in a manner that results in sales.

**Integrated Assessment:**

**Integrated Formative Assessment:**

The skills development provider will use the curriculum to guide them on the stipulated internal assessment criteria and weighting. They will also apply the scope of practical skills and applied knowledge as stipulated by the internal assessment criteria. This formative assessment leads to entrance into the integrated external summative assessment.

**Integrated Summative Assessment:**

An external integrated summative assessment, conducted through the relevant Quality Council Trading Occupation Assessment Quality Partner is required for the issuing of this qualification. The external integrated summative assessment will focus on the Exit Level Outcomes and Associated Assessment Criteria.

**ARTICULATION OPTIONS**

**Horizontal Articulation:**

* Occupational Certificate: Visual Merchandiser, Level 3.

**Vertical Articulation:**

* Further Education and Training Certificate: Automotive Sales and Support Services, Level 4 (ID 62489).

## 3.2 Curriculum

The assessor should download the complete curriculum from the QCTO web page <https://www.qcto.org.za/full---part-registered-qualifications.html>

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| 4 The role players in assessment and moderation |

## 4.1 Learner

Learners have the following responsibilities in terms of assessment:

* **Self-assessment.** Learners should actively participate in learning, complete formative assessment activities during the contact session and conduct self-assessment. The learner should then ask for assistance if necessary.
* **Complete the portfolio.** The portfolio guide contains guidelines for completing the portfolio. Every summative assessment question describes what you have to do. Ensure that you understand the question. Ask for assistance if you need it.
* **Receive feedback from the assessor**. The assessor will give you written feedback. If you do not understand the feedback, it is your responsibility to ask the assessor to clarify.
* **Accept or decline the assessment finding**. you receive your final assessment report, you will be asked to sign the report and to indicate whether or not you accept the assessor’s decision. If not, you have a right to lodge an appeal.
* **Evaluate the assessment process**. After completion of the assessment, you will be asked to complete a form to evaluate the assessment process. The purpose of this is to help the provider improve the assessment process.

## 4.2 Assessor

Assessors have the following responsibilities in terms of assessment:

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### 4.2.1 Formative assessment

Formative assessment activities ae competed during the contact session. They serve as regular checkpoints for the facilitator/assessor to determine whether learners are progressing as planned.

Formative assessment activities are not assessed formally, but evidence from these activities may be considered in cases where a small amount of evidence has been found lacking during the summative assessments.

### 4.2.2 Prepare the learner for assessment and reach agreement on the assessment plan

Obtain the unit standard and the assessment guide.

Ensure learners are informed of learning outcomes, assessment criteria, assessment and feedback procedure, as well as dates.

Explain to learners what valid, authentic, current and sufficient evidence is.

Determine learner readiness for assessment and ensure agreement is reached.

Inform learners of their rights relating to assessment and appeal and ensure they understand the appeal procedure.

### 4.2.3 Identify and address special needs

If a learner has indicated that he or she has special needs or is experiencing a particular barrier to learning, assessments will be adapted as required to ensure a fair, valid and reliable assessment.

Special needs and barriers may include, among others:

* Physical disabilities
* Hearing impairments
* Poor vision
* Language and communication barriers
* Psychological and emotional challenges
* Medical conditions

### 4.2.4 Prepare for the assessment

Preparing for assessment includes organising and preparing resources, people, schedules, venues, assessment instruments and documents.

Prepare yourself by determining the learning context, assessment policies and administration requirements.

Obtain the qualification document and curriculum from the QCTO web page.

Determine learner readiness for assessment and ensure agreement is reached.

### 4.2.5 Administration

Perform administrative duties when you receive documents for assessment. These duties include, but are not limited to ensuring the following:

* The assessment plan/agreement/learner preparation checklist is completed in full and the learner has signed this (can be found in the Portfolio guide that is intended for collecting all documents to be submitted to the Assessment Centre for enrolling learners for Final External Integrated Assessment).

### 4.2.6 Conduct internal summative assessment

Internal summative assessment for knowledge components takes in the form of a knowledge test.

Portfolios are typically submitted 4 to 6 weeks after the contact session. Timeframes to be decided by the accredited provider and agreed with learners in the Assessment agreement.

Evaluate the evidence based on the criteria and guidelines in the assessment guide.

Keep record of communication with learners.

### 4.2.7 Provide feedback

Provide feedback to learners in the format of the detailed assessment feedback report supplied by the provider.

Ensure feedback meets the following criteria:

* Assessment feedback and results are handled as confidential.
* Provide feedback to learners within 30 days of receiving documents for assessment.
* Provide learners who are found Not Yet Competent with the necessary advice and support.

### 4.2.8 Re-assessment

* Learners who are deemed not yet competent on a summative assessment will normally not be allowed to be re-assessed on more than two occasions.
* When learners have to undergo re-assessment, the following conditions will apply:
  + - Specific feedback will be given so that candidates can concentrate only on those areas in which they were assessed as not yet competent
    - Re-assessment will take place in the same situation or context and under the same conditions as the original assessment
    - Only the specific outcomes that were not achieved will be re-assessed
* Candidates who are repeatedly unsuccessful should be given guidance on other possible and more suitable learning avenues.

### 4.2.9 Review of assessment

The assessor shall review the assessment in terms of:

* Process
* Evidence requirements
* Assessment method

The assessment guide typically provides the format for the assessment review.

The assessment review report is prepared for a batch of assessments and is submitted to the moderator, together with the list of assessment results, for the moderator to select portfolios for moderation.

### 4.2.10 The assessor’s role in terms of moderation

The assessor will receive a copy of the moderator’s report for the purposes of analysis and self-development.

An assessor may be requested to redo assessments at no additional remuneration if the moderator found that the assessor did not adhere to all principles of good assessment.

Assessors have a right to appeal against findings of the moderator.

## 4.3 Moderator

Moderators are expected to:

* Verify assessor registration.
* Verify that assessments are fair, valid, reliable and practicable.
* Evaluate assessment design, assessment process and assessment outcomes including documenting proof of learners’ competence status.
* Evaluate the performance of registered assessors.
* Identify areas for improvement within the assessment process.
* Identify the need for re-design of assessment tools/instruments.
* Evaluate the moderation process and identify areas for improvement.
* Provide an appeals procedure.
* Provide feedback on assessments to the relevant SETA.

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| 5 Learner rights relating to assessment |

Learners have the following rights relating to assessment:

* To be informed about the requirements for assessment, for ex ample, when and how assessment will take place; assessment activities they will be required to perform; type an amount of evidence required
* Timing of assessment to be suitable, i.e. when the learner is ready for assessment
* Fair assessment
* Feedback on assessment, including an indication of what further evidence is required if that is the case
* Re-assessment – the Training provider will provide information on re-assessment opportunities
* Guidance on further learning opportunities in the event that the learner is repeatedly found Not Yet Competent
* To be assessed in language of preference, as far as practicable, or to have an interpreter available
* To have special needs accommodated, for example, hearing, speaking or physical impairment, where possible
* The assessment to be free from barriers to a fair assessment, for example, access to venue for assessment, cost of assessment, working shifts
* Appeal against an assessment in the event of:
  + An unfair assessment
  + An invalid assessment, i.e. the assessment did not assess what was supposed to be assessed
  + Disagreement with the assessor’s judgement
  + Unethical behaviour of the assessor

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| 6 Alignment matrix with assessments |

## 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

| **KM#** | **IAC #**  **Internal Assessment criteria description** | **Learner guide Module #** | | **Section # in Learner guide** | **Formative activity #** | **Internal assessment test Module & question no.** | **Notional hours in training** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **KM-01-KT01: Principles of interacting with different types of wholesale and retail customers**  **(20%)** | IAC0101 List and explain the different types of customers encountered in a wholesale or retail environment | | 1 | 1.1 | 3 | Test KM01 Q1 | 1 |
| IAC0102 Explain the generally accepted ways of acknowledging different types of customers | | 1 | 1.3 | 4  5 | Test KM01 Q2 | 4 |
| IAC0104 Explain the principles of acknowledging unattended customers | | 1 | 1.6 |  | Test KM01 Q4 | 2.5 |
| IAC0105 Explain the benefits of acknowledging unattended customers | | 1 | 1.5 |  | Test KM01 Q5 | 1 |
| **KM-01-KT02: Creating a positive image in a sales environment (20%)** | IAC0201 Explain the principles and effects of first impressions in a sales environment | | 1 | 2.1 | 6 | Test KM01 Q6 | 3 |
| IAC0202 Describe the effect that personal appearance and grooming has in presenting a positive image to customers in a sales environment | | 1 | 2.2 |  | Test KM01 Q7 | 2 |
| IAC0203 Explain the importance and impact of housekeeping on the sales environment using examples | | 1 | 2.3 |  | Test KM01 Q8 | 3 |
| IAC0204 Explain the role of the sales assistant in general housekeeping of a retail or wholesale outlet | | 1 | 2.4 | 8 | Test KM01 Q9 | 3 |
| **KM-01-KT03: Communicating with wholesale and retail customers (25%)** | IAC0301 Explain the concept of personal zone awareness and how this impacts on customers | | 1 | 3.1 |  | Test KM01 Q10 | 1 |
| IAC0302 Explain the concept of using professional language when interacting with customers | | 1 | 3.3 | 10 | Test KM01 Q11 | 2 |
| IAC0303 Explain the principles of verbal and non-verbal communication in retail and wholesale sales | | 1 | 3.2 | 9 | Test KM01 Q12 | 4 |
| IAC0304 Explain the importance of listening skills when communicating with customers | | 1 | 3.4 | 11 | Test KM01 Q13 | 3 |
| IAC0305 List and explain four principles of telephone etiquette in retail | | 1 | 3.5 | 12 | Test KM01 Q14 | 1.5 |
| **KM-01-KT04: The concept and importance of resolving customer queries (20%)** | IAC0401 List four (4) examples of generally accepted types of customer queries in the retail and wholesale sales environment | | 1 | 4.2 | 13 | Test KM01 Q16 | 1.5 |
| IAC0402 Explain the importance of responding to customer queries | | 1 | 4.3 | 14 | Test KM01 Q15 | 2 |
| IAC0403 Describe generally accepted ways of responding to or resolving customer queries | | 1 | 4.4 | 15 | Test KM01 Q16 | 2.5 |
| **KM-01-KT05: Handling customer complaints (15%)** | IAC0501 Explain the generally accepted ways of handling a customer complaint | | 1 | 5.3 | 16  17  18 | Test KM01 Q19 | 3 |
| IAC0502 Explain the difference between a customer complaint and a query | | 1 | 4.1 |  | Test KM01 Q17 | 0.5 |
| IAC0503 List and explain the typical steps to dealing with an angry or upset customer | | 1 | 5.4 |  | Test KM01 Q19 | 0.5 |
| IAC0504 Explain how resolving customer complaints could have an effect on sales | | 1 | 5.1 |  | Test KM01 Q18 | 2 |
| IAC0505 Explain the principles of escalating customer queries and complaints | | 1 | 5.5 | 19 | Test KM01 Q21 | 3 |

### 522301001-KM-02: Principles of service excellence and building customer relationships in retail and wholesale sale

NQF Level 3, Credits 3

| **KM#** | **IAC #**  **Internal Assessment criteria description** | **Learner guide Module #** | **Section # in Learner guide** | **Formative activity #** | **Internal assessment test question no.** | **Notional hours in training** |
| --- | --- | --- | --- | --- | --- | --- |
| **KM-02-KT01: The different types of service environments (15%)** | IAC0101 List the different types of service environments in the wholesale and retail industry giving an example for each | 2 | 1.1 |  | Test KM02 Q1 | 1.5 |
| IAC0102 Explain the similarities between self-service, partial service and full service wholesale and retail outlets | 2 | 1.1 | 20 | Test KM02 Q2 |
| IAC0103 Explain the differences between self-service, partial service and full service wholesale and retail outlets | 2 | 1.1 | 20 | Test KM02 Q3 |
| IAC0104 Explain the impact that the service environment has on customer service offered by a retail or wholesale outlet | 2 | 1.1 | 20 | Test KM02 Q4 |
| **KM-02-KT02: Concepts and principles of service excellence (50%)** | IAC0201 Explain the difference between customer service and service excellence | 2 | 2.2 | 22 | Test KM02 Q5 | 2 |
| IAC0202 Explain the importance of adhering to service standards of an organisation | 2 | 2.5 |  | Test KM02 Q7 | 2 |
| IAC0203 Explain the circle of service when providing customer service with examples | 2 | 2.1 | 21 | Test KM02 Q6 | 1.5 |
| IAC0204 Explain the impact that good service has on sales using examples | 2 | 2.3 | 23 | Test KM02 Q7 | 0.25 |
| IAC0205 Explain the impact that poor service has on sales using examples | 2 | 2.4 | 23 | Test KM02 Q7 | 2.5 |
| 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 | 2 | 2.6 |  | Test KM02 Q8 | 0.5 |
| IAC0207 Explain the impact that the Consumer Protection Act has on sales | 2 | 2.7 | 24 | Test KM02 Q9 | 2.5 |

| **KM#** | **IAC #**  **Internal Assessment criteria description** | **Learner guide Module #** | | **Section # in Learner guide** | **Formative activity #** | **Internal assessment test question no.** | **Notional hours in training** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **KM-02-KT03: Principles of building customer relationships (35%)** | IAC0301 Explain the difference between building customer relationships and offering customer service | | 2 | 3.1 |  | Test KM02 Q10 | 0.25 |
| IAC0302 Explain generally accepted ways of building professional customer relationships in the wholesale and retail sales environment | | 2 | 3.2 |  | Test KM02 Q11 | 0.25 |
| IAC0303 Explain the importance of prospecting customers to build customer relationships used by some retail organisations | | 2 | 3.3 |  | Test KM02 Q12 | 0.5 |
| IAC0304 Explain the impact of healthy customer relationships on the sales person or the business | | 2 | 3.4 |  | Test KM02 Q13 | 0.5 |
| IAC0305 Describe generally accepted retail organisational tools or strategies used for encouraging the customer to come back and shop again | | 2 | 3.5 |  | Test KM02 Q15 | 0.5 |
| IAC0306 Describe the impact that following up has on building healthy customer relationships | | 2 | 3.6 |  | Test KM02 Q14 | 0.5 |
| IAC0307 Explain the influence that the customer service experience has on future business | | 2 | 3.7 | 25 | Test KM02 Q16 | 1.5 |

### 522301001-KM-03: Concepts and principles of selling in a full service retail and wholesale environment

NQF Level 3, Credits 4

| **KM#** | **IAC #**  **Internal Assessment criteria description** | **Learner guide Module #** | **Section # in Learner guide** | **Formative activity #** | **Internal assessment test question no.** | **Notional hours in training** |
| --- | --- | --- | --- | --- | --- | --- |
| **KM-03-KT01: Concepts and principles of managing own sales targets (15%)** | IAC0101 Explain the concept and impact of sales targets on the retail sales advisor in the wholesale and retail environment | 3 | 1.1 |  | Test KM03 Q1 | 2 |
| IAC0102 Explain the difference between team targets and personal sales targets in a wholesale or retail outlet | 3 | 1.2 | 26  27 | Test KM03 Q2 | 1.5 |
| IAC0103 Describe generally accepted ways of planning to achieve set sales targets through self - management, self-motivation and commitment to the target | 3 | 1.3 | 26  27 | Test KM03 Q3 | 1.5 |
| **KM-03-KT02: Concepts and principles of the sales cycle (70%)** | IAC0201 Explain the generally accepted ways of preparing for sales | 3 | 2.2 | 28 | Test KM03 Q4 | 2 |
| IAC0202 Explain the importance of understanding customers buying motives | 3 | 2.3 |  | Test KM03 Q5 | 0.75 |
| IAC0203 List and explain three ways to approach customers in a retail outlet | 3 | 2.4 | 29 | Test KM03 Q6 | 1.5 |
| IAC0204 Describe the principles of qualifying customer needs through the use of questioning | 3 | 2.5 |  | Test KM03 Q7 | 1.5 |
| IAC0205 Explain the importance of product knowledge in the retail or wholesale sales environment | 3 | 2.6 |  | Test KM03 Q8 | 0.5 |
| IAC0206 List two sources of obtaining product knowledge in the industry | 3 | 2.7 |  | Test KM03 Q9 | 0.5 |
| IAC0207 Explain the concepts and principles of using features, advantages and benefits of products when demonstrating products in the sales cycle | 3 | 2.8 | 30 | Test KM03 Q10 | 4 |
| IAC0208 List three types of objections experienced during the sales cycle | 3 | 2.9 |  | Test KM03 Q11 | 1 |
| IAC0209 Explain generally accepted ways of overcoming objections | 3 | 2.9 |  | Test KM03 Q11 |
| IAC0210 Describe positive and negative customer buying signals | 3 | 2.10 |  | Test KM03 Q12 | o.5 |
| IAC0211 List and explain five generally accepted ways of closing a sale | 3 | 2.11 |  | Test KM03 Q13 | 1 |
|  | IAC0212 Explain the principles of providing after sales service using examples | 3 | 2.12 |  | Test KM03 Q14 | 1.5 |
| IAC0213 Explain the difference between providing after sales service in a partial service sales environment and the full service sales environment | 3 | 2.13 |  | Test KM03 Q15 | 0.5 |
| IAC0214 Explain the psychology of selling through the sales cycle using examples | 3 | 2.14 |  | Test KM03 Q16 | 1 |
| **KM-03-KT03: Principles of advanced selling skills (15%)** | IAC0301 Explain the principles and importance of selling-up during a sale | 3 | 3.1 |  | Test KM03 Q17 | 0.25 |
| IAC0302 Explain the principles of add-on sales | 3 | 3.2 | 31 | Test KM03 Q18 | 2 |
| IAC0303 Describe the impact that add-on sales and selling-up has on the sales person and the business | 3 | 3.3 | 32 | Test KM03 Q18 | 1.5 |
| IAC0304 Explain the concept of selling alternative products | 3 | 3.4 | 33 | Test KM03 Q19 | 1 |
| IAC0305 List three types of supplementary services offered in the wholesale and retail industry | 3 | 3.5 |  | Test KM03 Q20 | 0.5 |

### PRACTICAL MODULES

|  | | | **Applied knowledge** | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **PM#** | **PM description** | **IAC #**  **Internal Assessment criteria description** | **AK # and description** | **Learner guide Module #** | **Section # in Learner guide** | **Practical activity or Case study # in practical training workbook** |
| **PM-01-PS01** | **Greet different types of customers telephonically** | 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 | 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 | 1 | 3.5 | 4.1.1  4.1.2  4.1.3  4.1.4  4.1.5  4.1.6  4.1.5  4.1.8  4.1.0  4.1.10 |
| IAC0102 The introductions made includes the introduction of the learner, the company and department appropriate to the case scenario | 1 | 3.5 |
| 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 | 3.5 |
| **PM-01-PS02** | **Approach different types of customers face-to-face** | 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. | 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 | 1 | 1.4  1.6 | 4.1.1  4.1.2  4.1.3  4.1.4  4.1.5  4.1.6  4.1.5  4.1.8  4.1.0  4.1.10 |
| IAC0202 The response includes the introduction, finding out the customer's name and offering to be of service appropriate to the scenario | 1  3 | 1.6  2.4.1 |
| **PM-01-PS03** | **Present a professional and positive image** | IAC0301 Poor grooming and personal hygiene is correctly identified from the given scenarios | 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 | 1 | 2.2 | 4.1.1  4.1.2  4.1.3  4.1.4  4.1.5  4.1.6  4.1.5  4.1.8  4.1.0  4.1.10  Formative activity 7 |
| IAC0302 Good grooming and personal hygiene is correctly identified from the given scenarios | 1 | 2.2 |
| IAC0303 The recommendations for improvement to personal hygiene and grooming habits are correct as they apply to the given scenario | 1 | 2.2 |
| 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 | 2.2 |
| **PM-02-PS01** | **Handle customer queries** | IAC0101 The customer query is identified according to the case scenario | AK0101 Techniques for identifying customer queries  AK0102 Methods for responding to customer queries  AK0103 Methods for escalating customer queries | 1 | 4.2  4.3  4.4 | 4.1.1  4.1.2  4.1.3  4.1.4  4.1.5  4.1.6  4.1.5  4.1.8  4.1.0  4.1.10 |
| IAC0102 The response to the customer query is appropriate and results in the customer's need for more information being met | 1 | 4.2  4.3  4.4 |
| 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 |  | 4.2  4.3  4.4  5.5 |
| **PM-02-PS02** | **Handle customer complaints** | IAC0201 Customer complaints are identified and responded to according to the given case scenario in a manner where the complaint is resolved | 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 | 1 | 5.3 | 4.1.1  4.1.2  4.1.3  4.1.4  4.1.5  4.1.6  4.1.5  4.1.8  4.1.0  4.1.10 |
| IAC0202 Upset customers are identified and appropriate actions are recommended in order to facilitate the calming of the customer | 1 | 5.4 |
| 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 | 1 | 5.5 |
| **PM-03-PS01** | **Provide customer service to internal customers** | IAC0101 The internal customer service situation is correctly identified according to the case scenario | AK0101 Techniques for identifying customer queries  AK0102 Methods for responding to customer queries  AK0103 Methods for analysing case scenarios | 1 | 1.1.2 | 4.1.1  4.1.2  4.1.4  4.1.5  4.1.6  4.1.5  4.1.8  4.1.0  4.1.10  4.2.1 |
| IAC0102 The response to the internal customer service situation is appropriate to the scenario given and results in the internal customers' needs being met | 1 | 1.1.2 |
| IAC0103 The impact of the service provided to the internal customer affecting the external customer is correctly identified | 1 | 1.1.2 |
| **PM-03-PS02** | **Provide customer service to external customers** | IAC0201 The positive and negative moments of truth are identified appropriate to each external customer service scenario | AK0201 Techniques for identifying positive and negative external customer service situations and moments of truth  AK0202 Techniques for analysing case scenarios | 2  1 | 2.1  2.1 | 4.1.1  4.1.2  4.1.4  4.1.5  4.1.6  4.1.5  4.1.8  4.1.0  4.1.10  4.2.2 |
| IAC0202 The customer comments provided are analysed and identified as positive or negative customer service feedback | 2  1 | 2.1  2.1 | 4.1.1  4.1.2  4.1.3  4.1.4  4.1.5  4.1.6  4.1.5  4.1.8  4.1.0  4.1.10  4.2.2 |
| **PM-03-PS03** | **Provide after sales service** | IAC0301 The after sales service opportunities identified are appropriate to the scenario and promotes good customer relations | 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 | 2.12 | 4.1.1  4.1.2  4.1.4  4.1.5  4.1.6  4.1.5  4.1.8  4.1.0  4.1.10  4.2.3 |
| 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 | 2.12 |
| **PM-03-PS04** | **Enhance customer relationships** | IAC0401 The customers past purchases are correctly identified for three (3) customers as applicable to the information given | 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 | 2 | 3.2  3.5  3.6  3.7 | 4.1.1  4.1.2  4.1.4  4.1.5  4.1.6  4.1.5  4.1.8  4.1.0  4.1.10  4.2.3  4.2.4 |
| IAC0402 The future purchase plans are correctly identified for three (3) customers as applicable to the information given | 2 | 3.2  3.5  3.6  3.7 |
| IAC0403 The customers' future purchase plan information is correctly matched to the promotion or customer loyalty information as applicable to the information given | 2 | 3.2  3.5  3.6  3.7 |
| **PM-04-PS01** | **Use the sales cycle to sell products** | 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 | 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 | 1  3 | 2.1  2.2  3.1  3.2  3.3  2.4.1 | 4.3.1.1  4.3.1.2  4.3.1.3  4.3.1.4 |
| 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 | 1  3 | 3.4.7  2.5 |
| 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 | 3 | 2.8.6 | 4.3.1.1  4.3.1.2  4.3.1.3  4.3.1.4 |
|  |  | IAC0104 Objections presented by the role-play customer are overcome through active listening techniques appropriate to the scenario | 3 | 2.9 |
| 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 | 3 | 2.11 | 4.3.1.1  4.3.1.2  4.3.1.3  4.3.1.4 |
| **PM-04-PS02** | **Develop features, advantages and benefit product sheets** | IAC0201 The features of the given product are identified and recorded on the product sheet | 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 | 3 | 2.8 | 4.3.4.1  4.3.4.2  4.3.4.3  4.3.4.4 |
| IAC0202 The advantages explain the feature clearly and also explain any terminology that would be unfamiliar to a potential customer | 3 | 2.8 |
| IAC0203 The benefit for each product feature is correctly matched as applicable to the information given | 3 | 2.8 | 4.3.4.1  4.3.4.2  4.3.4.3  4.3.4.4 |
| IAC0204 The benefits are matched to the buying motive applicable to the information given | 3 | 2.8 |
| **PM-05-PS01** | **Sell add-on products and supplementary services** | 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 | 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 | 3 | 3.2  Formative activity 31 | 4.4.1 |
| IAC0102 Supplementary services are matched appropriate to the customers' needs and are appropriate to the scenario | 3 | 3.5 | 4.4.1  4.4.3 |
| **PM-05-PS02** | **Use selling up techniques and offering alternative product sales** | IAC0201 Products appropriate for the selling up are identified appropriate to the case scenario given and match the customers' buying need | K0201 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 | 3 | 3.1 | 4.4.2  4.4.4 |
| IAC0202 Products appropriate to offer as alternatives are identified appropriate to the case scenario and match the customers' buying need | 3 | 3.4 | 4.4.2  4.4.3 |

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| 7 Assessment preparation |

## 7.1 Candidates

7.1.1 Candidates are prepared during the delivery of the Learning Programme’s contact time.

7.1.2 Learners sign declarations that they were prepared in their Portfolio guides.

7.1.3 The Assessor is to prepare the learner(s) for assessment by:

* Explaining
  + How feedback will be given to the learner
  + Learner review of assessment practices
  + Moderation and certification
  + Appeals procedure
* Agreeing the assessment plan – time-frame
* Confirming readiness of learners for assessment, completing and signing the form

***Learner preparation and assessment plan***

* Providing contact details of Assessor to learners in the event that they need to contact the Assessor about difficulties in terms of meeting the agreed dates.

## 7.2 Assessor

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Programme name** | Qual 99669 Retail sales advisor | | | | | | | |
| **Level** | 3 | | | **Credits** | | | 54 credits | |
| **PURPOSE AND APPROACH** | | | | | | | | |
| **Purpose of Assessment** | The purpose of this assessment is to determine knowledge and practical competence of the learner. | | | | | | | |
| **Assessment Approach** | Knowledge components: Knowledge tests  Practical components: Practical guide and log | | | | | | | |
| **ASSESSOR PREPARATION** | | | | | | | | |
| **Organisational assessment and moderation policies and procedures available to Assessor (Yes/No)** | | | | | |  | | |
| **Qualification document obtained from SAQA/QCTO web page (Yes/No)** | | | | | |  | | |
| **Curriculum document obtained from QCTO web page (Yes/No)** | | | | | |  | | |
| **Special Assessment Requirements** |  | | | | | | | |
| **Special needs of candidates** | (Special needs related to the candidate(s) to be recorded here) | | | | | | | |
| **Assessor has received the model answers for tests** | | | Yes/No | | Comments | | | |
| **Assessor has reviewed curriculum, assessment strategy and instruments (including the Assessment design and plan matrix)** | | | Yes/No | |  | | | |
| **Name and surname of assessor** | |  | | | | | | |
| **Signature of assessor** | |  | | | | | **Date** |  |

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| 8 Feedback to learners |

Assessors must be registered to assess against the qualification and have industry experience as described in the curriculum.

Assessments are to be conducted in accordance with this Assessment Guide.

Written feedback to be given to learners and employers in the format of the Assessment Feedback Report included in this Assessment Guide.

Learners must receive feedback within 1 month of handing in their Portfolio guides.

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| 9 Evidence principles |

‘Good’ evidence is, as per the SAQA requirements:

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| **No.** | **Principles** | **Description** |
| 1. | Valid | The assessment must be valid in the sense that it must fit the purpose. |
| 2. | Authentic | The evidence that the candidate submits must be conducted by the candidate him/herself, in a real-life work environment, or acceptably simulated environment to the satisfaction of the assessor, and must bear the signature of the candidate parties involved. |
| 3. | Current | The evidence that is gathered must be a current and applicable. |
| 4. | Sufficient | The evidence must cover all the criteria that have been established and the performance of the candidate must be at the required standard. Thus, there must be sufficient to have enough evidence. |

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| 10 Recording and administration of assessment results |

The method of recording assessment and feedback is in the Assessment Feedback Form, which is included in the Learner assessment guide and in this Assessment guide.

Evidence of remediation required, re-submission and re-assessment must be indicated in the columns provided and feedback on re-assessment provided, as in the Assessment Feedback Form.

A list of final assessment findings must be submitted to the Training Provider.

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| 11 Recognition of prior learning |

Recognition of prior learning may be given according to the Training provider’s procedure for unit standards previously completed by learners.

The provider shall provide requirements for recognition of prior learning.

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| 12 Evidence guide for formative assessment activities |

Model answers/guidelines for assessment of formative activities are provided in the ***Facilitator guide***, at the positions where activities should be completed during the facilitation process.

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| 13 Model answers for knowledge tests |

## 13.1 MODEL ANSWERS – KNOWLEDGE TEST – KM01

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| **KNOWLEDGE ASSESSMENT**  **MODEL ANSWERS** | |
| **Qualification** | **Retail sales advisor**  Aligned with Curriculum 523101001  **KNOWLEDGE MODULE KM01** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Total possible marks** | 168 | **Minimum marks required** | 117 (70%) |

**Question 1 (6 marks) KM01-IAC0101**

Explain the different types of customers of a wholesale or retail outlet.

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| --- | --- |
| **Type of customer** | **Explanation** |
| Internal customers (4 marks) | ***Give explanation plus 2 examples.***  *The people who have an* ***interest in the business****. I*nternal customers usually include **stakeholders** or shareholders, who have invested in the business.  Internal customers also **include *employees*** *– every employee receives goods or services produced elsewhere in the company as inputs to his or her work. An internal customer is anyone within the company who at any time is dependent on anyone else within the company. For example:*   * ***Sales persons*** *are dependent on procurement for having stock available to sell to consumers.* * ***Accounting team*** *members are dependent on all staff handling financial documents (sales records, goods receiving records, stock count records, etc.) to be able to prepare accurate financial statements for the company.*   *(4 marks)* |
| External customers (2 marks) | *The consumers who* ***purchase goods*** *and services from the business. They are the lifeblood of a retail business –* ***without enough customers who make enough purchases, there is no retail business.***  *(2 marks)* |

**Question 2 (10 marks – one mark per fact) KM01-IAC0102**

Explain generally accepted ways of acknowledging different types of customers based on their behaviour.

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| --- | --- |
| **Type of customer behaviour** | **Explanation** |
| Customers who are just looking | * *Offer to provide information* * *Engage them through conversation* |
| Customers who are looking around | * *Approach them with open questions* * *Be attentive to their needs and offer products that will meet the need* |
| Customers who are phoning in | * *Provide the information they are asking for* * *Offer a solution Ask open questions to make sure you understand what they want or need* |
| Customers who are in a hurry | * *Move at a speed that reflects your understanding of the customer’s need for speed. Few things are as frustrating to a customer in a hurry as a sales person who walks slowly or creates the impression that there is lots of time to complete the sale. Where possible, speed up things. You can, for example, pack the purchase while you are waiting for authorisation of a credit card transaction.* * *Use an empathetic tone of voice and speak at an appropriate speed.* |
| Excited customers who ask a lot of questions | * *Confirm the facts and explain any benefits that the customer might not be aware of.* * *Confirm that they are making the right decisions by explaining how the product features and benefits meet the customer needs or desires* |
| Detail-oriented customer | * *Fully understand the customer needs or desires, and then to help identify products that will satisfy such needs and desires.* |
| Confident customer | * *Confirm the customer’s needs and confirm how the needs will be fulfilled by the purchase, instead of explaining in length the benefits of a product.* |

**Question 3 (3 marks – one mark per fact) KM01-IAC0103**

What is the impact of greeting diverse customers professionally?

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| ***First impressions*** *are important for a variety of reasons; greetings can be* ***culturally diverse*** *and it is important for sales advisors to be aware of this as they aim to communicate positively with customers.*  ***When sales advisors acknowledge and respect diversity, they have a greater opportunity to attract and retain diverse customers,*** *build better rapport with them and increase customer satisfaction.* |

**Question 4 (8 marks – one mark principle and 1 mark per explanation) KM01-IAC0104**

Explain the principles of acknowledging unattended customers

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| *Answers should cover the following (no need for learners to draw a diagram)* |

**Question 5 (10 marks) KM01-IAC0105**

Explain the benefits of acknowledging unattended customers.

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| **Benefit** | **Explanation** |
| **Increased comfort levels for customers** | * *Acknowledging makes the customer feel comfortable and at home and creates a positive experience for the customer.* * *Greeting therefore opens the lines of communication. Customers are comfortable asking questions and receiving information about products. This gives sales advisors an opportunity to explain product features or show customers where they can find an item.* |
| **Customer feedback opportunities** | * *When communication lines are open, customers might be encouraged to talk about quality concerns, the store's return policy or inventory levels, if the item they are seeking is out of stock.* |
| **Increased sales** | * *When the sales advisor acknowledges an unattended customer, he or she creates the opportunity to find out what the customer needs or desires, and to offer suitable products.* * *Without establishing that initial rapport with a greeting, the potential customer might leave without the information needed to make a purchase.* * *Engaged customers who might have been “just looking” customers could become more interested in what the store has to offer, and make purchases.* * *Sales advisors should acknowledge each customer immediately, even if they are helping another customer. A brief statement, such as, "Hello, I will be right with you," can encourage a customer to stay until the sales advisor is free to provide help.* |
| **Repeat business** | * *Positive customer experiences result in repeat businesses. As Peter Cheales says, most customers return to stores where they felt welcome.* * *Welcoming customers with a friendly greeting can lead them to return to your store as regulars. Customers sometimes bond with employees who have helped them in the past. If patrons are ignored when they enter your shop, the perceived unpleasant atmosphere might discourage return visits.* * *By contrast, a positive encounter with your staff could lead to "word-of-mouth advertising" to relatives, friends, acquaintances and perhaps even through Internet review sites. Customer service starts with an employee greeting at the door and builds through a willingness to help during the shopping experience.* |

**Question 6 (4 marks) KM01-IAC0201**

6.1 Explain how “first impressions” are formed in a sales environment

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| * *First impressions are based on what customers see and hear.* * *You have only one opportunity to make a first impression.* |

6.2 What is the effect of first impressions in a sales environment?

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| * *A positive first impression is the first step to satisfied and loyal customers.* * *First impressions set the tone for the rest of the customer’s experience.* |

**Question 7 (5 marks) KM01-IAC0202**

What effect does personal appearance and grooming have on customers’ first impressions?

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| --- | --- |
| Effect of good personal appearance and grooming | * *Personal appearance creates the first impression the moment that a customer notices an employee in wholesale and retail. The appearance can create an impression of being professional and well-organised.* * *Staff members who look professional create the impression of competence and instil confidence about the business.* * *Well-groomed personal appearance communicates your positive attitude and professionalism* |
| Effect of poor personal appearance and grooming | * *When staff members are not well-groomed, it creates an untidy and unorganised image of the business. Customers will not trust the business or the staff.* * *Poor personal grooming communicates an attitude that you don’t care about your own image or that of the store, and therefore about what customers think about the store.* |

**Question 8 (3 marks) KM01-IAC0203**

Why is good housekeeping important in a sales environment?

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| * *Housekeeping has a direct impact on the purchasing behaviour of customers. For instance, a clean retail space will attract customers and potentially increase the likelihood of purchases, return visits and customer recommendations.* * *To ensure the overall customer experience is positive for customers, it is essential to maintain a clean, tidy and safe store.* * *Good housekeeping in* the wholesale and retail environment impact on sales |

**Question 9 (5 marks) KM01-IAC0204**

What is the sales advisor’s role in housekeeping? List 5 responsibilities.

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| * *All displays are clean, neat, and dust free.* * *The store’s housekeeping standards are followed. The standards may include instructions such as:* * *Sweep floors (or arrange for sweeping) when displays are completed.* * *All merchandise and display areas to be dust free.* * *Glass counters and display fixtures to be clean and shiny.* * *All products on display are displayed in the correct areas, according to the display layout plan of the store.* * *All products on display are displayed safely and securely, to prevent stock loss.* * *Housekeeping should not only take place on scheduled times; you should constantly monitor display areas as you move around.* * *Keep work areas clean and orderly. Flatten empty boxes immediately and remove them from the display area as soon as possible.* * *Do not litter. Keep wrapping materials together and out of the way. Remove from display areas as soon as possible.* * *Dust shelves and display areas before starting to unpack and display merchandise.* * *Follow your organisation’s policy and procedures relating to handling waste, for example, recycling of plastic and boxes.* * *Ensure pricing is correct and display pricing labels are* neat and tidy |

**Question 10 (12 marks) KM01-IAC0301**

10.1 Explain “personal zone” or “personal space” and how people experience it. Include the 4   
 types of personal zone based on distance. (7 marks)

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| * *Personal space or zone is the region surrounding a person which they regard as psychologically theirs.* * *Most people value their personal space and feel discomfort, anger, or anxiety when their personal space is intruded.* * *Permitting a person to enter personal space and entering somebody else's personal space are indicators of perception of those people's relationship:* * *An intimate zone* * *Personal zone* * *Social zone* * *Public zone* |

10.2 Explain the impact of zone awareness on customers and the responsibility of sales   
 advisors. (5 marks)

|  |
| --- |
| *Entering somebody's personal space is normally an indication of familiarity and sometimes intimacy.*  *Culture is one of the factors which contribute to people's perceptions of how personal zones should be used. People from different cultures have different views on what the proper personal space should be. People experience personal zones differently because of the way their beliefs are shaped in a certain culture.*  *Physical contact between two people can be perfectly correct in one culture, and totally unacceptable in another. In Western societies, people keep more space around themselves than other ethnic groups do. In India, however, women cannot interact so freely with men, or there could be serious consequences. As a result, the use of proxemics differs greatly among people of different cultures.*  *Problems can develop when people of different cultures get together, because they may have different views on personal zones.*  *In a wholesale and retail environment, sales advisors should keep a* ***professional distance*** *from customers, otherwise customers will not feel comfortable to interact, and they may leave the store without buying. A professional distance can be seen as the* ***personal zone****, that is, between 60cm and 1.5 meters apart.* |

**Question 11 (10 marks) KM01-IAC0302**

11.1 Explain what professional language is in a sales environment. Give examples. (5 marks)

|  |
| --- |
| *Professional* ***language*** *includes:*   * *Using polite, respectful language – appropriate ways of addressing customers, such as either using their names, or addressing them as “Sir”, “Madam”, etc. and not using words such as “my dear”, “Bra”, “my chommie”, “Ouma”, etc.* * *Using appropriate language and not using slang. Slang consists of words that are non-standard in a given language, or that are too informal for a particular situation, such as “Yeah”. Instead of "hi", use "hello"; instead of "yeah", use "yes"; say "I cannot" instead of "I can't."* * *Avoiding using interjections such as “huh” and “uh-huh”.* * *Using correct grammar.* * *Being concise and to-the-point. Long explanations and lots of background leading up to a point can make the customer tune out long before you get the point you want to make. Get to the point right away, and you will be more effective. The explanations of why can come afterwards.* * *Using words that everybody understands instead of “big words”. For example, “This torch uses …” instead of “This torch utilises …”* |

11.2 Why is it important that a sales advisor should use professional language? (5 marks)

|  |  |
| --- | --- |
| Benefits of professional language | * *Professional image of the business* * *Positive emotional connection with the customer, which may increase sales* |
| Consequences of unprofessional language | * *Negative image of the business* * *Annoyed or offended customer is possible*   *Negative emotional reaction from customers, which may have a negative effect on sales* |

**Question 12 (17 marks) KM01-IAC0303**

Explain the concepts listed in the table.

|  |  |
| --- | --- |
| **Verbal communication** | |
| Description (2 marks) | ***Verbal communication*** *is the use of words to convey a message. Some forms of* ***verbal communication*** *are written and oral* ***communication****.* |
| Principles (***list*** and ***describe*** at least 4) (8 marks but learner must list and describe at least 4) | * ***Courtesy:***   + *Courtesy means thinking about the receiver and his or her feelings.*   + *Customer courtesy refers to a variety of behaviours demonstrated by a company's sales and service employees that affect a customer's experience. When customers visit your business or call on the phone, the level of courtesy employees show affects whether customers buy and whether they come back.*   + *Courtesy requires using polite words and gestures, being appreciative, thoughtful and showing respect for the receiver.*   + *Using professional language is all about being respectful and using appropriate (suitable) level of formalness. The sales advisor should not be too casual when communicating with the customer, and should address the customer in a respectful manner. The customer should, for example, be addressed as “Sir” or “Madam” and not “Bra”, “Ouma”, etc. Where possible, use the customer’s name.* * ***Specificness***   + *Professional language is about being specific, not vague.*   + *Do not use terms such as “about”, “approximately”, “I think …”, “probably”, etc.* * ***Conciseness:***   + *The message should be concise. When you are concise in your communication, you stick to the point and keep it brief.*   + *Concise language does not include any unnecessary details and it is short, but complete. This means, you must be brief and only say as much as that is necessary to bring your message across.*   + *Conciseness is achieved by avoiding wordy expressions and repetition as well as using to-the-point sentences.* * ***Clarity:***   + *To be clear, try to minimise the number of ideas in each sentence.*   + *Make sure that it is easy for your customer to understand what you are meaning. Customers should not have to “read between the lines” and make assumptions on their own to understand what you are trying to say.* * ***Constructiveness:***   + *The sales advisor should always use constructive and not destructive language or communication.* |

|  |  |
| --- | --- |
| **Non-verbal communication** | |
| Description  (1 mark) | ***Nonverbal communication*** *is the use of body language to convey a message* |
| Principles (give at least 3)  (6 marks but learner must list and describe at least 3) | * *Non-verbal communication* ***supplements verbal communication****. For example, if someone says you are welcome and they are smiling, the smile confirms the verbal message.* * *Non-verbal communication* ***shows your attitude*** *towards someone or a situation, for example responsiveness or liking, or lack of it.* * *Non-verbal communication* ***expresses cultural values****, for example respect shown in some African cultures with eyes downward when in the presence of an important person. Another example is proximity in European cultures – they do not feel comfortable if someone whom they do not know well comes closer than arms-length from them.* * ***If there is conflict between a verbal and non-verbal message, we trust the non-verbal message****. For example, if someone says he or she is glad to help you, but their body language shows they are not alert and upright, we don’t believe them.* |
| Examples of positive non-verbal communication in a sales environment (give 3) | *Positive body language, that is, body language that shows you are professional and ready to serve the customer, includes:*   * *Standing up straight – not leaning against a counter or slouching* * *Walking with energy* * *Making eye contact and keeping eye contact while you are listening to them* * *Friendly face and smile* |
| Examples of negative non-verbal communication in a sales environment (give at least 3) | * *Avoiding eye contact.* * ***Bad posture****. Leaning onto a counter, slouching, etc.* * *Fleeting hands.* * *Invading personal space.* * *Holding a defensive stance.* * *Excessive movement.* |

**Question 13 (2 marks) KM01-IAC0304**

Why are good listening skills important when you communicate with customers?

|  |
| --- |
| * *Most effective sales advisors know that effective listening is the most important part of their job.* * *When you listen to the customer, it is easier and faster to reach a mutually beneficial solution.* * *Effective listening prevents miscommunication and conflicts that slow down the sales process or drive customers away* |

**Question 14 (8 marks) KM01-IAC0305**

Indicate whether the following statements are true or false.

|  |  |  |
| --- | --- | --- |
| **Statement** | **True**  **(✓)** | **False**  **(✓)** |
| Customers do not mind when phones that ring a long time before being answered, because they enjoy listening to the music |  | **✓** |
| Customers get annoyed when they cannot hear what the person assisting them is saying | **✓** |  |
| It is important to clear your mind and to focus your attention before answering the telephone. | **✓** |  |
| When answering the phone, you should turn away from your computer, your e-mail, documents that you are working on, etc. | **✓** |  |
| If customers like what they hear in the voice on the phone, chances are they will perceive you as confident and knowledgeable. | **✓** |  |
| You should control the tone of your voice when you speak on the phone | **✓** |  |
| The phone should be answered between the 5th and 7th ring |  | **✓** |
| Good telephone etiquette is to always greet first. Then identify yourself or your department and then offer help. | **✓** |  |

**Question 15 (8 marks) KM01-IAC0402**

Why is it important to respond to customer queries? List 4 consequences of not resolving queries and 4 benefits of resolving queries.

|  |  |
| --- | --- |
| **Consequences of not resolving customer queries** | **Benefits of resolving customer queries** |
| * *Dissatisfied customers* * *Loss of potential sales* * *Poor service reputation of the business* * *Disappointed customers telling others about their poor experiences* | * *Satisfied customers* * *Sales* * *Satisfied customers telling others about their good experiences* * *Good service reputation of the business* * *Repeat business and loyal customers* * *Increased sales and profits* |

**Question 16 (14 marks) KM01-IAC0401 and KM01-IAC0403**

|  |  |
| --- | --- |
| Give 4 examples of general customer queries in wholesale and retail  (4 marks) | *Customer queries could include:*   * *Types of products available* * *Product features* * *Differences between two or more products* * *Is a specific product in stock?* * *Price* * *Warranty/guarantee* * *How the product works* |

|  |  |  |
| --- | --- | --- |
| List and describe 5 guidelines for generally-accepted ways of responding to customer queries in wholesale and retail sales environment  (10 marks – one mark for each guideline that is listed and 1 mark for the explanation of the listed guideline) | **Response** | **Explanation** |
| ***Know your products*** | * *Full knowledge of the products you represent will help you answer customer questions correctly. Educate yourself about features and functions of new products.* * *Use the products and services you represent. This will help you to relate to the customer and use personal experience to answer questions.* |
| ***Allow the customer to explain the question*** | * *A customer with questions will likely have an explanation why they have a specific question.* * *Let the customer explain the question fully without interrupting so you understand what the customer is asking.* |
| ***Check your understanding*** | * *Summarise and restate the customer's question back to him or her to be sure you understand what is being asked. This technique lets the customer know you are listening and it helps you verify your understanding.* * *You might say something like, ‘Just to confirm, you are not sure whether you need a special cable to print from your laptop to your printer. Right?’* |
|  | ***Use a positive tone of voice*** | * *The tone of voice you project can affect how the customer perceives your response. When answering a customer’s questions, always project a confident and pleasant tone of voice, even if the customer is not very pleasant with you.* |
| ***Check your answer*** | * *If you have any doubt about how to answer a customer’s question, ask for help from a co-worker. Customers will appreciate getting a correct answer, even if it takes a little longer. An answer that proves to be inaccurate or incomplete will lead to customer dissatisfaction.* |
|  | ***Promise only what you can deliver*** | * *Only give a customer an exact price or date of delivery if you can guarantee it.* * *Promising delivery time that is not within your control or standard store operations will result in a dissatisfied customer.* |
|  | ***Anticipate other information the customer may need*** | * *For instance, if a cus­tomer asks you for the balance due on his account, you can provide the balance along with additional information that could be of interest or benefit to the customer, such as how to track bal­ances online or a special that is com­ing up next month: ‘Mrs Smith our Clinique special starts next Monday.’* |

**Question 17 (2 marks) KM01-IAC0501**

Explain the difference between a customer query and a customer complaint by describing what each is.

|  |  |
| --- | --- |
| Customer query | *A* ***customer query*** *is a question or a request from a customer for information about something such as a product or service.* |
| Customer complaint | *A* ***complaint*** *is a problem, difficulty, or concern that the customer has about service or a product that he or she bought.* |

**Question 18 (5 marks) KM01-IAC0504**

What effect can resolving customer complaints have on sales?

Explain by giving the consequences of not resolving complaints and the benefits of resolving complaints.

|  |  |
| --- | --- |
| **Positive effect of resolving customer complaints** | * *A customer complaint should be seen as a gift from the customer — it shows that the customer cares enough to take the time and effort to inform the business of the problem.* * *Customers who have their complaints resolved become loyal customers who tell other people about the good service they received; this is effective word-of-mouth advertising which does not cost the company any money.* * *It creates a positive impression of the business and brings in more customers because they have heard about the service.* |
| **Negative effect if customer complaints are not resolved** | * *Customers whose complaints are not resolved, will tell their friends.* * *Negative word-of-mouth publicity from dissatisfied customers results in loss of income and profits and makes it necessary for the organisation to spend more money on advertising to attract replacement customers.* * *This further decreases the business’ profits.* |

**Question 19 (21 marks) KM01-IAC0501**

Describe 7 steps for handling customer complaints.

|  |  |  |
| --- | --- | --- |
| **Step number** | **What to do**  **(1 mark for the mention of each step)** | **How to do it (give 2 guidelines or each step = 2 marks per step)** |
| 1 | Be open and available to receive complaints | * You should be friendly and approachable so that the customer feels free to talk to you about the complaint. * Greet the customer, ask their name and use the name during the interaction. * See complaints as a gift to the organisation. It gives you the opportunity to create a loyal customer. |
| 2 | Apologise | * Apologise for the inconvenience. * Demonstrate a caring attitude. * Show empathy by acknowledging the custo-mer’s feelings. This is important as they won’t be interested in a solution unless they feel that you understand their feelings. * Address feelings before you offer solutions. One of the most common mistakes made with an upset customer is to jump to the point of offering solutions too quickly. You should first make the customer feel understood and cared for. Example: *I understand your frustration* …. * Paraphrase their problem — state it back to them to ensure you have all the facts and they are reassured that you have been listening to them. |
| 3 | Listen to understand the complaint | * Ask the customer the details of the complaint. * Do not interrupt the customer as people can become stressed when they are interrupted. It is also not polite to interrupt. Wait until the customer has finished talking and then ask questions or make comments. * You should listen effectively, that is, with your full attention, and make sure you understand the customer’s complaint. You will need to ask questions to ask for more information and to clarify your understanding. |
| 4 | Identify shortfalls in product or customer expectations | * A shortfall in the product is any failure or shortcoming in the quality of a product, for example, the product does not work at all or it does not work the way it should, or it is not as fresh it should be, etc. * A shortfall in service delivery exists when the customer’s expectations in terms of the service he or she received did not meet the customer’s expectations. |
| 5 | Give information | Give the necessary information to help the customer understand, for example, the reason for a policy or procedure, how to use a product in the future, etc. |
| 6 | Find a solution | * Find a solution. * If you cannot help, find someone who can. * Never allow a customer to leave with a problem that is not solved. * Have a ‘no problem’ attitude. * Have a can-do attitude. * Check what alternatives you could offer, and ask the customer to select their preferred solution, for example: *Mrs Smith, would you like a replacement or a refund?* * Once the customer has agreed to a solution, give a time frame. * Repeat the solution to the customer, and ask again if they are happy with the suggested or selected solution. Ask if the agreed time frame is suitable. * Thank the customer for assisting you by pointing out a problem. |
| 7 | Report it | * Record details about the complaint such as customer’s name and contact details, the product or service, how you dealt with it and how the customer reacted. * Report all complaints; even the smallest problem. The information is valuable for management to put procedures in place to prevent future problems. |

**Question 20 (10 marks) KM01-IAC0503**

List and explain 5 steps/techniques for dealing with an upset or angry customer.

1 mark for each technique listed and 1 mark for each explanation.

|  |  |
| --- | --- |
| **Assume the customer has a right to be angry** | * The most common response to customer complaints is to evaluate the merit of the complaint while you are listening to it. You should avoid such evaluation and common response and replace it with the assumption that the customer has a right to be angry, so that you are open to listen to why the customer is upset. * The customer may be angry because of several reasons. * The customer may feel betrayed because the product or services did not meet expectations. It is also possible that the customer may be angry because he or she made incorrect assumptions that led to inappropriate expectations. Previous experiences and previous contacts with your company may also play a role in the customer’s emotions. Another possibility is that the problem may have occurred at a very inconvenient time for the customer. * Regardless of the circumstances, acknowledge the customer has the privilege to be irate. Listen carefully to how the anger is expressed so you can find the root cause of the emotion. |
| **Listen to the emotion without emotion** | * Listen to the emphasis that the customer places on specific topics so you can identify why the customer is upset. * Listen to the emotion as well as the words. The customer may, for example, say that he or she is angry, or disappointed or disillusioned. Listening carefully will help you identify and acknowledge the emotion, for example, *I can understand your frustration; I am sorry that you are disappointed*; etc. * Imagine that a customer experienced a technical malfunction when downloading digital images of a special event, wedding or family vacation from a camera to a computer. The hardware or software may have caused the technical issue, but the customer’s emotional distress is related to the risk of losing precious memories. * Although your first thought may be to immediately correct the technical problem, you must first acknowledge the customer’s emotional response to the problem. If you don’t do that, it is unlikely that the customer will be happy with whatever you offer to do. * You should stay calm and not respond with emotion. Remember that the custom’s anger is not directed at you personally. If the customer is using language that attacks and borders on abusiveness, it is because the customer is looking for acknowledgement of the emotional distress as well as the problem. You may have to repeatedly acknowledge the customer’s emotion to diffuse the situation. |
| **Be patient** | * It is not effective to interrupt the customer when he or she is venting their feelings; it is like pouring gasoline on a raging fire. * You should be patient and wait for the customer to finish venting their emotions before you respond with questions or a solution. |

|  |  |
| --- | --- |
| **Speak softly** | * You should respond to upset and loud customers by speaking softly and with a very steady tone. * If you shout back or interrupt the customer, you will engage in a verbal battle and the customer will not pay attention to what you are saying. * Remember that the customer has approached you for resolution if the problem and ultimately wants your advice and assistance. |
| **Reiterate** | * After you have listened carefully to the customer, reiterate the priorities that you believe that you heard from the customer’s perspective to ensure that you are focused on the appropriate issues. * Make sure that you are addressing the technical, administrative and emotional aspects of the customer concerns. |

**Question 21 (5 marks) KM01-IAC0505**

Explain the principles of escalating customer queries and complaints**.**

|  |
| --- |
| 1. Inform the customer about the need to escalate. 2. Contact the internal or external resource to whom you escalate. 3. When you contact a resource — internal or external — you need to provide all the information that the person needs to resolve the customer’s complaint. 4. You also need to persuade the person to resolve the customer’s complaint in a manner that satisfies all parties involved.   There are three steps for effective interacting with resources to resolve the complaint: |

## 13.2 MODEL ANSWERS – KNOWLEDGE TEST – KM02

|  |  |
| --- | --- |
| **KNOWLEDGE ASSESSMENT**  **MODEL ANSWERS** | |
| **Qualification** | **Retail sales advisor**  Aligned with Curriculum 523101001  **KNOWLEDGE MODULE KM02** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Total possible marks** | 86 | **Minimum marks required** | 60 (70%) |

**Question 1 (6 marks) KM02-IAC0101**

List the different types of service environments in wholesale and retail and give an example of each.

|  |  |
| --- | --- |
| **Type of service environment** | **Example** |
| ***Self-service*** *– customers walk through the store, choose what they want and make their way to the pay point* | *Discount supermarket* |
| ***Partial service*** *– customers can browse and choose what they want but should they require service, there are people available who have the product knowledge able to assist the customers* | *Cosmetic store selling more affordable cosmetics*  *General hardware store*  *Clothing retailers* |
| ***Full-service*** *– advice given where detailed product knowledge is required before the customer can make a buying decision* | *Pharmacy – medicine*  *Skin products (especially upmarket products)*  *Stores selling expensive or specialised equipment* |

**Question 2 (2 marks) KM02-IAC0102**

Explain the similarities between self-service, partial service and full service wholesale and retail outlets.

|  |
| --- |
| *In partial and full service, sales advisors are available and should attend to customers who need assistance.* |

**Question 3 (3 marks) KM02-IAC0102**

Explain the differences between self-service, partial service and full service wholesale and retail outlets.

|  |
| --- |
| *In self-service outlets, staff are not normally available to assist customers on the shop floor. In partial service, sales advisors are available but customers typically need less assistance. In full service, customers are mostly reliant on assistance by sales advisors.* |

**Question 4 (3 marks) KM02-IAC0102**

Explain what customer service is expected in the following types of service environment:

|  |  |  |
| --- | --- | --- |
| **Self-service** | **Partial service** | **Full service** |
| *Although mainly self-service, people should be available to direct customers to the correct aisles and answer queries about the location of the store.*  *Some larger mainly self-service stores have more specialised departments and need staff who are competent to assist in these areas.* | *Requires fewer staff members but the people still need sound product knowledge and must be sufficiently competent to assist customers with queries.* | *Full-service stores require sufficient and competent staff with a depth of product knowledge to provide the type of service expected.* |

**Question 5 (2 marks) KM02-IAC0201**

Explain the difference between customer service and service excellence.

|  |  |
| --- | --- |
| **Customer service** | **Service excellence** |
| ***Customer service*** is about attending or ***paying attention*** to customers | ***Service excellence*** means that service excellence is about “***delivering what is promised*** *and* ***dealing well with any problems*** *and queries that arise*”. |

**Question 6 (9 marks) KM02-IAC0203**

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** |
| *Establish contact* | *Establish contact with the customer with a prompt, friendly greeting.* | *Learners should give their own example, such as:*  *I will make eye contact and say “Good morning, Sir.* |
| *Solve the customer’s problem* | *Meeting the customer’s need and / or solving his or her problem, involves the selling cycle* | *Learners should give their own example* |
| *Monitor satisfaction* | *Assess whether the customer is satisfied with the service. Trouble-shoot any concerns the customer might have.* | *Learners should give their own example* |

**Question 7 (10 marks) KM02-IAC0202, KM02-IAC0204 and KM02-IAC0205**

Why is it important to adhere to customer service standards of the wholesale or retail outlet? Answer by explaining the impact of good customer service and the consequences of poor customer service.

You may use the diagram to help you answer.





**Question 8 (5 marks) KM02-IAC0206**

How does knowledge of store layout, awareness of promotions and awareness of stock availability help have a positive effect on the sales advisor and on the store?

|  |
| --- |
| *Knowledge of store layout, awareness of stock availability and awareness of promotions will enable you to provide excellent service to customers, because you will be able to quickly:*   * *Answer questions about where to find specific products in the store.* * *Answer questions about whether certain products are in stock.*   *Make suggestions to customers about promotions, and thereby not only make customers happy, but also help increase sales for the store.*  *Increased sales increase profits.* |

**Question 9 (10 marks) KM02-IAC0207**

How does the Consumer Protection Act impact on sales advisors?

Explain this by listing 5 rights of consumers. For each right, explain the duties of the sales advisor.

|  |  |
| --- | --- |
| **Consumer’s right** | **Duties of the sales advisor – with examples** |
| *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.* | *The sales advisor should ensure that customers are assisted in examining goods according to the store’s policy and procedure.*  *For example, if a customer wants to inspect a water kettle, the sales advisor should show the customer, or use the display unit to show and explain.* |
| *A supplier must show the price, label and/or trade description of the goods on his/her packaging. The content may not be misleading.* | *Sales advisors should assist with ensuring that product prices are displayed.*  *For example, ensure that prices are in the correct places, so that customers are not misled.* |
| *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.* | *Sales assistants should ensure that customers who enter into credit agreements fully understand the terms of the agreement, for example, financial obligations (such as monthly instalments and duration of the contract).* |
| *A supplier may not use force or manipulate a consumer to enter into an agreement, or to pay for goods or services.* | *Sales assistants should ensure that during their selling efforts, they do not place pressure on customers to buy products or enter into agreements.*  *For example, if a customer indicates he or she cannot afford a product, the sales advisor may mention the store’s credit terms, but not force the customer to buy the products on credit.* |
| *A consumer has the right to a receipt after paying for goods or services.* | *The sales assistant should ensure the customer receives a receipt* |
| *A consumer is entitled to a copy of any agreement between the retailer and the consumer.* | *Ensure the customer receives a copy of any agreement.* |
| *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.* | *Do not oversell or let a customer pay if stock is not available.* |
| *The representation or marketing of goods or services may not be misleading or false.* | *Ensure you provide correct, accurate and complete information.*  *Do not make misleading presentations about products.* |
| *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.* | *Follow the company’s procedures for returning goods* |

**Question 10 (4 marks) KM02-IAC0301**

Explain the difference between offering customer service and building customer relationships.

|  |
| --- |
| ***Customer service*** *is aimed at the “****here and now”*** *– providing the* ***service that the customer needs****.*  ***Building customer relationships*** *is about* ***providing excellent service*** *and* ***creating special experiences for customers turn them into loyal customers*** *who* ***recommend the business to other people.*** |

**Question 11 (3 marks) KM02-IAC0302**

Explain ways in which businesses build professional customer relationships in the wholesale and retail industry.

|  |
| --- |
| *Customer service is about serving the customer now.*  *Building customer relationships is about making sure customers are satisfies, so that they will become loyal customers who enter into a long-term relationship with the business.* |

**Question 12 (3 marks) KM02-IAC0303**

Why is it important to prospect customers to build customer relationships**?**

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| --- |
| * *The main reason for prospecting for new customers is that it allows the business to identify good-fit customers for the business. This means finding leads who truly need the products and services of the business to solve customer challenges.* * *Prospecting is important because if customers don't know what the business offers, it doesn't matter what the price range is, how great customer service is or how great the products are: these aspects are irrelevant because when potential customers don’t know about the business, they simply are not thinking about the business and shopping there.* * *When prospecting works, the business attracts more potential customers to convert into buyers.* |

**Question 13 (8 marks) KM02-IAC0304**

What is the impact of healthy customer relationships on the sales advisor or the business? List and explain 4 impacts.

|  |  |
| --- | --- |
| **Impact** | **Explanation** |
| *Loyalty and customer retention* | *Healthy customer relationships create loyalty and customer retention. When customers feel good about their interactions with staff at the wholesale or retail outlet, they become loyal and remain customers while the positive relationships are maintained.* |
| *Insights into customer problems and needs* | *Positive customer relationships give the business more insight into the problems and needs of the customers, because of open communication channels, through which customers provide feedback.* |
| *Better individual interactions create trust* | *Positive customer relationships pave the way for better individual interactions with customers. Over time, this builds up trust in the business, which, in turn, influences customer buying decisions.* |
| *Increased sales and profits* | *Customer loyalty, trust and better insight of the business into customer needs and problems all lead to increased sales, and, therefore, increased profits.* |

**Question 14 (3 marks) KM02-IAC0306**

How does following up have a positive impact on building customer relationships?

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| --- |
| *Following up with customers is a great strategy to develop positive relationships with customers. It has several impacts:*   * *It makes customers feel appreciated and special, turning them into loyal customers – customers stick around when they feel a business cares for them.* * *Consistent following up with customers keeps the lines of communication open, which offers a benefit for both parties. It shows appreciation for the customers, and they will be comfortable to open up about problems or issues they have experienced with the business or its products. The feedback helps the business understand its customers better, making it possible to better serve the needs and expectations of the customers.* * *Wholesale and retail outlets that do regular follow-up create a personal connection with customers and come across as reliable.* |

**Question 15 (10 marks) KM02-IAC0305**

Describe 5 tools and strategies that wholesalers and retailers use to encourage customers to come back again and again.

|  |  |
| --- | --- |
| **Technique or strategy** | **How it works** |
| *Loyalty programmes* | * *A customer loyalty program is a marketing approach that recognises and rewards customers who purchase or engage with a brand on a**recurring basis.* * *A company may allocate points or perks, and graduate customers to higher levels of loyalty (tiered loyalty programmes).* * *A loyalty program's main purpose is to make more money by keeping your current customers.* |
| *Personalised customer service* | *Personalised customer service is about delivering customised services that cater to the exact needs and wants of the customer.*  *It boils down to remembering who your customers are and treating them as individuals.*  *Personalised customer service adapts experiences to a customer's past interactions and takes advantage of available customer data to provide customer service according to a customer’s preferences.*  *Examples:*   * *A sales advisor lets a customer know that blouses in the customer’s favourite colour are available in the store.* * *Amazon's product recommendations based on a customer’s past purchases.* * *Clicks loyalty card recommending to pensioners to shop on a certain day of the week, when double points can be earned.* * *A sales adviser uses information and knowledge of a customer’s personal interest to let the customer know about promotions. For example, a customer who has a taste for dinnerware with an African theme, can be informed by the sales advisor that the store has received new stock with African designs, or that a promotional sale is being run on this range at the store.* |
| *Future discount vouchers* | * *Discount voucher means a voucher carrying a right to receive a price discount or rebate with for specific goods either as a percentage or as a fixed amount. For example, for every R500 purchase, the store could offer a voucher for 10% off to a future purchase.* |
| *Free give-ways or samples* | * *Stores may hand out gifts as a way of showing that the store values the customer’s patronage. This may take many forms – from product samples, to free products, or even a branded pen or other promotional item.* |
| *Feedback programmes or systems (including product ratings)* | * *Providing feedback opportunities will make customers feel heard and as though they are more than just another number.* * *Many different methods are available for getting feedback, but one of the most common is the use of anonymous surveys.* |
| *Active social media presence* | * *Social media platforms are valuable in developing a personality for the store’s brand. It helps to keep the business top of the customers’ minds.* * *Creative, eye-catching social media posts not only gain attention for the business, but further provide current customers with updates and also material to point to when recommending the business to other people.* |
| *VIP customer programmes* | * *A VIP program offers exclusive rewards to the most loyal customers of the business, giving them more reasons to spend with the brand.* * *The benefits of a VIP program are reserved for top-tier customers – those who have significantly contributed value to the business, usually in the form of repeat purchases.* |
| *Exclusive discounts for loyal customers* | * *Loyal customers may be given one-time special discounts on specific products,* |
| *Re-engagement e-mails or messages* | * *E-mails short text messages (SMS) and WhatsApp broadcast messages can all be used to re-engage customers by, for example, letting the customers know that a popular product is back in stock, or that there is a new seasonal release of a range of products.* |

**Question 16 (5 marks) KM02-IAC0307**

How does the customer experience influence future business from customers? Refer to good and poor customer experiences.

|  |
| --- |
| * *There is a strong correlation between customer experience and loyalty.* * *Good customer experience leaves people feeling heard and appreciated. Those businesses that get it right to consistently provide positive customer experiences are more likely to retain customers and have those customers recommend the products or services to a friend.* * *Poor experiences may lead to customers leaving and telling other people about their poor experiences.* * *Research conducted by PWC led them to report that “when customers feel appreciated, companies gain measurable benefits — including the chance to win more of their customers’ spending dollars. The payoffs for valued, great experiences are tangible: up to a 16% price premium on products and services, plus increased loyalty.”* * *They further report that customers said they were more likely to try additional services or products from brands that provide superior customer experience.* |

## 13.3 MODEL ANSWERS – KNOWLEDGE TEST – KM03

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| --- | --- |
| **KNOWLEDGE ASSESSMENT**  **MODEL ANSWERS** | |
| **Qualification** | **Retail sales advisor**  Aligned with Curriculum 523101001  **KNOWLEDGE MODULE KM03** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Total possible marks** | 163 | **Minimum marks required** | 114 (70%) |

**Question 1 (6 marks) KM03-IAC0101**

* 1. Explain what a sales target is. (3 marks)

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| --- |
| *A sales target is a company-****specified amount of sales*** *in terms of units or volume or monetary value (Rands) that is set as a* ***target for a sales team or a sales person*** *in order* ***to achieve or exceed within a time period like month****, quarter or year.* |

* 1. Explain the impacts of sales targets on the sales advisor: (3 marks)

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| --- | --- |
| ***Clarity*** | *Sales targets help the sales advisor understand what the company expects in terms of sales numbers for a week, month or year.* |
| ***Increased sales*** | *The sales target along with effort by the sales advisor helps increase sales and profits.* |
| ***Long-term goals*** | *The sales advisor’s sales targets contribute to achieving the company’s long-term financial goals.* |

**Question 2 (3marks) KM03-IAC0102**

What is the difference between team targets and personal sales targets?

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| --- |
| *A* ***team sales target*** *sets out the target that a team, for example, the appliance sales team should achieve in a given period such as a week, month, or year.*  *An* ***individual sales target*** *sets out the target that every individual sales advisor should achieve in a given period such as a week, month, or year. The individual sales targets should, together, make up the sales target for the team.* |

**Question 3 (15 marks) KM03-IAC0103**

Describe the ways of planning to achieve sales targets through self-management, self-motivation and commitment to the target. (1 mark per fact)

|  |  |
| --- | --- |
| ***Break targets down*** | * *Breaking down targets makes it easier for the team to measure how they are performing against the targets.* * *Breaking down targets helps with getting commitment form individual sales advisors, because they know clearly what is expected and can manage themselves - by knowing how many units they are expected to sell, they can put in effort to make sure they achieve the targets.* * *When targets are broken down into smaller units, people feel more motivated to achieve the target because it seems more achievable than when only looking at the overall target.* |
| ***Measure and communicate*** | * *Supervisors and managers usually talk about sales targets and performance throughout the day to keep those targets top of mind of all sales advisors.* * *This is intended to keep the team members accountable and motivated to achieve their targets. Where an individual sales advisor is not meeting the target, he or she can be coached or can ask for assistance on how to achieve the targets.* * *Dashboards or graphs may be used to visually communicate and report on both the targets and performance.* |
| ***Use CRM tools*** | *CRM (Customer Relations Marketing) tools are used to connect with existing customers with a view to retaining these customers and selling more to them.* |
| ***Manage yourself*** | * *Managing yourself is an important aspect for every sales advisor.* * *To manage yourself, you need to know what your personal sales target is, and follow effective steps for closing sales.* * *If you are not meeting your targets, ask for help from your supervisor or manager in identifying why you are not meeting your targets, or in improving your selling skills.* |
| ***Motivate yourself*** | * *Self-motivation is the ability to drive oneself to take action to pursue goals and complete tasks**or achieve the targets set for you.* * *Self-motivation is intrinsic (internal) motivation, that is, motivation from your inner self and not from external factors.* * *Self-motivation is the best and the most effective form of motivation. Other people such as your supervisor or manager cannot really motivate you – they can at best create an environment in which you feel motivated and encourage you. It is, however, important that you motivate yourself.* * *Rather than external rewards, like money or recognition from your supervisor or manager, actions driven by your internal motivation have a built-in personal reward. Feelings of enjoyment, and achieving excellence come from pursuing your personal goals build self-motivation.*   *Actions to help you find internal motivation include:*   * *Find ways to give yourself a boost when you need it, and avoid giving up when you hit a dip.* * *Focus your attention and energy on achieving your personal goals; not on how much recognition you are getting for your efforts.* * *Surround yourself with supportive people. Avoid any negative colleagues.* |

**Question 4 (10 marks) KM03-IAC0201**

Explain how to prepare for sales.

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| --- | --- |
| ***Acquire product knowledge*** | * *Know the product range that is available* * *Know product features* * *Know benefits of products and their features* |
| ***Gather information about customers*** | *Gather information about:*   * *The store’s target market* * *Buying motives* * *How customers prefer to shop* * *What the target market spends their disposable income on* |
| ***Make sure the sales area is favourable to effective selling*** | * *Good housekeeping* * *Effective and attractive displays* * *Prices displayed* * *Ensure equipment and stationery are available for recording sales* |

**Question 5 (3 marks) KM03-IAC0202**

Why is it important to understand customer buying motives?

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| * *When the sales advisor has a grasp on why customers are considering buying a product, he or she better understands how to approach customers and present products that meet their needs.* * *Understanding buying motives helps the sales advisor to align product benefits to the customer’s buying motive.* * *Customers’ internal drive is to satisfy their physiological and psychological needs and wants. These needs and wants, therefore, play the main role in purchase decisions.* |

**Question 6 (15 marks) KM03-IAC0203**

Explain 3 ways in which to approach customers. Give examples for each.

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| --- | --- |
| ***Greeting approach*** | * *This approach works well when the customer appears to be just browsing or has not yet shown interest in a particular product.* * *It involves greeting the customer in a friendly, welcoming and professional manner.* * *You should smile, use a friendly facial expression and a pleasant tone of voice to let the customer know you are happy to assist them.* * *The greeting should get a positive response from the customer and get a conversation started, to help you identify the customer’s needs and eventually lead to a sale.* |
| ***Merchandise approach*** | * *This approach may be used if the customer has shown an interest in a particular product by looking at it, touching it or reading information on the packaging.* * *This approach focusses the customer’s attention on the product and it provides you with an opportunity to start selling the features and benefits.* * *Example: If a customer is looking at a modern-design automatic, cordless kettle, you may say: ‘Good morning, Madam. Isn’t that a nice, modern design? And it is so convenient, being cordless and switching off automatically.’* |

|  |  |
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| ***Service approach*** | * *This approach can be used when the customer knows exactly what he or she wants, or appears to be in a hurry.* * *The approach is different from the greeting approach in that you immediately offer assistance (although you need to greet first).* * *Example: ‘Good morning, how can I help you with that?’*   *Note: Use this approach with an open question. If you ask, ‘Can I help you?’ the customer can easily say, ‘No, thank you’, closing the opportunity for you to continue with a conversation. Asking an open question, such as, ‘How can I help you…?’ requires the customer to answer with more than one word, leaving the opportunity to start a conversation.* |

**Question 7 (7 marks) KM03-IAC0204**

Describe the principles of qualifying customer needs through questioning.

7.1 Why is it important to establish the customer’s needs? (1 mark)

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| *You can only offer an appropriate product if you establish what the customer needs and wants.* |

7.2 List the types of questions that the sales advisor can use to establish customer   
 needs. Give 2 examples for each type of question. (6 marks)

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| --- | --- |
| **Type of question** | **Examples (2 per type of question)** |
| ***Open questions*** | * *“What would you like to get from the...”*   *“‘What type of functions/finish/material…”*   * *“What is the most important...”* * *“Who will be using the…”* |
| ***Closed questions*** | *“Would you prefer white?”*  *“Will you be the only person using this…?”* |

**Question 8 (8 marks) KM03-IAC0205**

Explain why product knowledge is important for the sales advisor by listing and explaining 4 benefits of product knowledge.

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| --- | --- |
| ***Improved communication skills*** | *Good knowledge of the products offered by the store allows you to use different techniques and methods of presenting the product to customers. This improves your communication skills with customers.* |
| ***Boosted enthusiasm*** | *When you really know the products, you feel enthusiastic about their features and benefits. Enthusiasm is one of the best-selling tools. When you are enthusiastic, you can create excitement for the product and you remove the customer’s uncertainty about whether the product you are offering is the best meet his or her needs.* |
| ***Increased confidence*** | *Good product knowledge helps to build the customer’s confidence about the products you offer.* |
| ***Increased sales*** | *There are five steps to selling. Product knowledge helps you in each step in different ways and it benefits customers, as explained below.* |

**Question 9 (2 marks) KM03-IAC0206**

List 2 sources from which the sales advisor can obtain product knowledge.

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| * **Reading promotional material** such as brochures, photos, product samples and press releases. * **Feedback from customers.** Careful attention to which features of a product customers praise or complain about, provides you with valuable information from the customer’s point of view. * **Speaking to your team members.** They may be able to:   + Give you more information on the features and benefits of the product.   + Tell you which type of customer buys the product.   + Share strategies of how they sell the product. |

**Question 10 (8 marks) KM03-IAC0207**

10.1 Explain product features. Give 2 examples (5 marks)

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| *Features are the physical, tangible and measurable features of a product – you can see, hear, feel or taste them. Features answer the questions:*  *“What is it?”*  *“What does it look like?”*  *“What does it do?”*  *Product features include factors such as:*   * *The product’s purpose* * *The product’s characteristics and/or specifications* * *How the product works and should be used* * *Product delivery (how it will be delivered and what the expected delivery period is)* * *How the product is maintained and serviced* * *How long the product is likely to last and for what period the warranty is valid* * *How the product compares to similar products offered by the business* * *How the product compares to products sold by the business’ competitors* * *The product’s strengths and limitations*   *Examples:* ***(learners to give any examples of product or service features)***   * *The washing machine has an on/off switch and simple buttons that indicate the appropriate washing programme for different types of clothing.* * *The building material is delivered to the customer’s address free of charge.* |

10.2 Explain product benefits. Give 2 examples (3 marks)

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| --- |
| *Benefits provide the answer to the customer’s question: “What’s in it for me to buy this product?”*  *Examples:*  *Free delivery: The customer does not have to worry about organising delivery or paying for it.*  *3-year guarantee: The customer knows the lawnmower will work for this period.* |

**Question 11 (6 marks) KM03-IAC0208 and KM03-IAC0209**

List three types of customer objections in the sales cycle. For each, give 2 suggestions for overcoming the objection.

|  |  |
| --- | --- |
| **Objection** | **How to overcome the objection** |
| ***Cost*** | * *Offer a payment plan according to organisational policy and procedures.* * *Show the value of the product by comparing it to a competitive product.* |
| ***Time*** | * *Describe the time necessary to install and use the product.* * *Compare and contrast the product to other products.* |
| ***Care*** | *Show the customer how to properly care for and maintain the product. This will save them time learning about it.* |
| ***Ease of use*** | *Offer additional assistance or refer them to resources that are easily available, such as a video that comes with the product or that is available on the Internet.* |
| ***Satisfaction*** | * *Clearly state the outlet’s return policy and procedure.* * *Explain guarantees.* * *Offer one-on-one help if the customer is not satisfied.* |
| ***Support*** | * *Offer ongoing support.* * *Make a follow-up call to make sure the customer is not experiencing problems with the installation, assembly or use of the product.* |

**Question 12 (8 marks) KM03-IAC0210**

12.1 Describe positive buying signals. (5 marks)

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| * **Asking about the price.** * **Using phrases such as:**   + “Do you have stock?”   + “Do you have it in blue?”   + **“**How soon can you deliver?”   + “Can I pay with my debit card?” * **Using possession language** - when the customer talks about how he or she will use the product, for example: “Now I can...” * **Asking another person’s opinion,** for example, “What do you think?” * **Change in body language,** for example, the customer suddenly relaxes after asking questions or discussing benefits and features of the product. * **Touching the money,** for example, taking out a wallet or purse or getting out cash or credit card. |

12.2 Describe negative buying signals (3 marks)

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| * *Mention he or she is still researching other solutions.* * *Not share budget information.* * *Say he or she is not interested in the product.* |

**Question 13 (20 marks) KM03-IAC0211**

List and explain 5 ways of closing a sale. For each, give an example of how to use it and an example of when to use the technique. (1 mark for each technique; 2 marks for the description and example for each; 1 mark for when to use each)

|  |  |  |
| --- | --- | --- |
| **Closing technique** | **Description and example** | **When to use** |
| ***Direct close*** | *Directly asking for the close, for example:*  *“May I ring this up for you?”*  *“How would you like to pay?”* | *Only use the direct close if you are pretty sure the customer is buying.* |
| ***Indirect close*** | *Confirming customer satisfaction with the offered products, for example:*  *“How does this look to you?”*  *“Is this agreeable to you?”*  *“Will this then work for you?”* | *To get final confirmation of customer satisfaction.* |
| ***Balance sheet close*** | *Summarising and weighing up the advantages and disadvantages, making sure the benefits or advantages (pros) outweigh the disadvantages (cons).*  *To apply this technique, list both the benefits of the purchase (the pros) and also the costs (the cons). Start with the cons and keep them short.*  *Example:*  *“Well, although it costs this much and is a bit big, it will sound really good and fit well into your house decor.*  *Let's weigh things up. You're not getting..., but you are well within your budget and will have..., ...and ....Hmm. That's good!”* | *To make an appeal to the rational (thinking) side of the customer.*  *In most situations, the customer has already convinced him- or herself they need to buy the product.* |
| ***Puppy-dog close*** | *Letting the customer take home the product with the option of returning it of he or she is not happy.* | *When you are confident what you are selling has lots of appeal and will be hard to give up once it has been used and enjoyed.* |
| ***Assumptive close*** | *It wraps up the sale, assuming that the customer has already agreed to purchase the product, not giving the customer a chance to object, for example:*  *“This sound system is just a killer. And I promise you will fall in love with it. Now, do you want it in red or black?”*  *“When shall we deliver it to you?”*  *“What will your friends say when they see it?”*  *“Will 20 cases be enough?”* | *This technique must be used with caution as it can backfire on you, and you lose the sale.* |
| ***Emotional appeal*** | *Emotional appeals include:*   * *The* ***possibility of loss*** *close. The sales advisor tries to close a sale by noting that the product is going to be sold out or that it won’t be available at ‘this rock bottom price’ any longer, or saying, “We have only three of these left. I'll write it up now to make sure you get one.” This close appeals to the customer’s sense of regret or fear of losing out.* * *The* ***cradle to grave*** *close. The sales advisor rebuts the customer’s objection that it is too soon to buy by saying it is never too soon to make a major life purchase. This close also appeals to the customer’s sense of regret.* * ***Sales contest*** *close. The sales advisor offers a small incentive to the customer, such as a modest rebate, justifying that the salesperson stands to gain if the sale is closed, for example:*   *“If I make this close, I am standing a chance to be salesperson-of-the-year.” This appeals to the customer’s sense of guilt.* | *Emotional appeals are powerful for closing the sale, but the customer may later resent you.* |
| ***Minor point close*** | *Assuming that agreement on a minor issue means agreement about the sale, for example:*  *“Would you want our wireless service with the package? No? Alright, we’ll leave it without the wireless.”*  *“Since the trim will match your other appliances so well, let's ring it up.”*  *“If you chose this one, which model would you prefer?”*  *“There are five shades available. Which do you like the best?”* | *When the customer has given buying signals for the main product but not the add-on product or service.* |
| ***Alternative choice*** | *Acting as if the customer has already decided to buy, and the only question left is which of a limited number of options they should choose, for example:*  *“Will this be cash or credit card?”*  *“Would you like it in silver or white?”*  *“Would you like one packet or two?”*  *“Which of these three instruments seems best for you?”* | *When clear buying signals are present.* |
| ***Trial close*** | *Testing the water in such a way that the sale can continue if the customer says “No”. It asks the customer to make small decisions that may eventually add up to a completed sale, for example:*  *“You will want it delivered by the weekend, won’t you?”* | *When buying signals are present but the customer seems a bit hesitant.* |
| ***Best-time close*** | *This close works by emphasising how now is the best time to buy and how delaying is not the best thing to do.*  *Examples:”*  *“We only bring these into stock for the Christmas season.”*  *“Summer is coming. Do you have all the garden furniture you need?”*  *“The forecast for next week is for sun. We have limited stocks of sun lotion.”*  *“The best time to buy is now, whilst...”* | *When the customer is procrastinating or will “be back”.* |
| ***Calculator close*** | *Use a calculator to calculate discount.*  *Example:*  *“Right, the selling price is R1200. Hold on a minute ... right, with the sale reduction and the extra discount for today, it comes to ... Does that look right to you?”* | *Popular in high-value sales such as jewellery and cars.* |
| ***Compliment close*** | *This close works by flattering the customer, massaging their ego so they are more concerned with feeling good than parting with their money.*  *Examples:*  *“Wow. You really know this product. Would you like to buy this now?”*  *“Well, as you are the expert, you will understand how good this is.”*  *“That dress looks really good on you, Madam.”* | *It can help to associate the customer with the product, so they feel their sense of identity becoming attached to the product.* |
| ***Daily cost close*** | *Reducing the total cost to how much it costs per day (or week, or month), for example:*  *“The phone contract adds up to only R.00 per day. Pretty inexpensive, isn’t it?”* | *This close is particularly useful for a product that has a limited lifetime.* |
| ***Exclusivity close*** | *Explaining how only a few can afford this.*  *Example:*  *There was only one made and it comes at a high price for that. So”, you will definitely not see another lady with the same dress.”* | *To boost the customer’s ego.* |

**Question 14 (8 marks) KM03-IAC0212**

14.1 Explain what after-sales service is. (1 mark)

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| *After-sales service is any support provided to a customer after the product or service has already been purchased* |

14.2 Why is after-sales important for the store? (1 mark)

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| *Companies use after-sales support as a business strategy as it typically leads to higher customer satisfaction, brand loyalty, and even word-of-mouth-marketing.* |

14.3 List and explain 3 types of after-sales service. (6 marks)

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| --- | --- |
| **Type of after-sales service** | **Explanation / examples** |
| ***Pre-installation service*** | * *Providing pre-installation services for items such as a copier machine or an air conditioner will greatly facilitate the customer. Some companies do it for free, while some charge for it.* |
| ***Warranty*** | * *Warranties are provided by almost all multinational companies for all their products. The duration and warranty of specific items may vary.* * *Some companies allow their customers to replace their products if found faulty. The companies encourage the repair of the dysfunctional part.* * *Companies also offer variable warranty policies to their customers.* * *For example, smartphone companies can be taken as a good example of after-sales service in terms of the warranty. Apple, Samsung, Huawei, and many other famous brands offer a one-to-two-year warranty on their Smartphones. Different brands offer warranties in different terms, such as software, mobile battery, and hardware.* |
| ***Online support*** | *It is mostly provided by e-commerce companies, although almost all multinational companies have dedicated a helpline for their customers.* |
| ***Replacement or return*** | * *Companies may provide free replacement or even return of their product.* * *This service comes with proper terms and conditions are associated with it. After the sale of the product, this service lasts only a few months.* * *Replacement can be either of the entire product or one part only. The return of the product is facilitated with a refund or another product from the same company. However, every company has a different policy.* |
| ***Upgrades*** | * *This post-sale service is often provided by electronic or software companies.* * *The upgrades provided by the software companies for a limited time is a classic example.* * *For example, the over-the-time update provided to the iOS users encourages them to buy apple products. These upgrades are necessary for the functioning of the device.* |

**Question 15 (2 marks) KM03-IAC0213**

Explain the difference between providing after-sales service in a partial sales environment and a full-service sales environment.

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| *In a full-service wholesale or retail outlet, sales advisors are responsible for explaining the available after-sales service(s) and issue guarantees and warranties.*  *On the other hand, in a partial-service environment, customers may be referred to online services for registering the products they bought for the purposes of guarantees and warranties. This is the latest type of after-sale service. It is mostly provided by e-commerce companies. Almost all multinational companies have dedicated online helpline for their customers. The online helplines can be accessed conveniently round the clock.* |

**Question 16 (12 marks) KM03-IAC0214**

Explain the principles of sales psychology and how the sales advisor can leverage (use) each.

|  |  |  |
| --- | --- | --- |
| **Principle** | **Explanation** | **How to leverage (use) the principle** |
| ***Reciprocity*** | *An internal pull toward repaying what another person has provided us with.* | *This principle is based on the idea that the person at the receiving end (the customer) will feel they ought to return the favour in exchange for the value offered.*  *Examples:*   * *A sales advisor giving a freebie to a potential customer, hoping that it will lead them to return the favour by purchasing something.* * *Offering customers some valuable information in exchange for signing up for future marketing offers.* |

|  |  |  |
| --- | --- | --- |
| ***Commitment and consistency*** | *Once people make a choice or take a stand, they consistently work to behave in line with that decision in order to justify it.* | *This principle is based on the theory that people like to be consistent with the things they have said or done. Once a person makes a decision, he or she often sticks to it.*  *Sales advisors can use the principle of consistency when they present products to customers by asking for, and looking for, small initial commitments from the customer on which they can “build”.*  *For example, you can ask the customer questions to which they will answer with a “yes”. Make a connection between the question and what you are selling. When you get the customer to say yes, he or she becomes much more likely to say “yes” when it comes to the buying decision.* |
| ***Social proof*** | *When we are unsure of something, we look to similar situations or others to provide us with direction to follow. The more that people follow the direction or action, the more they think it is the correct thing to do.* | *This principle states that people will look to the behaviours and actions of others to determine their own, especially when they are uncertain. They are looking out for social proof to back up the buying decision they are about to make.*  *Sales advisors can use this principle to influence the customer’s buying decision by telling the customers about the positive feedback from other customers, or by displaying reviews and opinions of other customers. In this way, existing customers are contributing to your selling efforts.* |
| ***Liking*** | *We tend to agree with people we like, and others who like us have a tendency to agree with us.* | *This principle suggests that we are far more likely to comply with requests made by people whom we like. Therefore, customers have a higher probability of purchasing something recommended by people close to them or the ones that they admire.*  *If your customers feel that you can understand the problems they are facing and relate to them, they tend to like you and buy from you.* |
| ***Authority*** | *We are more likely to say yes to others who are authoritative that is, people who carry great expertise, knowledge, or experience.* | *The principle of authority asserts that we are more likely to be persuaded or convinced by a person who we believe holds more knowledge or power than we do.*  *With regards to closing sales, this means that customers are more likely to be persuaded to complete a purchase when information about the product comes from a sales advisor who is seen as credible.* |
| ***Scarcity*** | *The principle of scarcity states that we always want more of what is less available or shrinking in availability.* | *The principle of scarcity outlines the fact that customers are always going to want more of what is scarce.*  *Consider how many times you’ve seen an advertisement stating something like: limited quantities, limited time offer, while supplies last, only a few items left in stock, etc. The (sometimes faked) scarcity causes a surge in the demand for the product and often speeds up the buying decision.* |

**Question 17 (9 marks) KM03-IAC0301**

17.1 What does “up-selling” mean? (2 marks)

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| *A sales advisor tries to motivate customers to purchase a higher-end product, an upgrade, or an additional item in order to make a more profitable sale.* |

17.2 Give 2 examples of up-selling. (2 marks)

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| * *Selling an extended service contract for an appliance* * *Suggesting that a customer opt for higher specifications in a new computer* * *Selling luxury options on a vehicle, such as leather upholstery* * *Suggesting that a customer purchase a more extensive car service package when taking out a mobile phone on a contract* * *Asking the customer to choose a larger meal size at a fast-food restaurant* * *Offering a pair of similar, but more expensive sneakers from the new collection* |

17.3 Why is up-selling important for the business? (1 mark)

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| It increases profits. |

17.4 Explain the following principles of up-selling: (4 marks)

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| ***Trust is vital*** | * *Customer relationships are built on trust. The sales advisor builds trust by getting to know the customer’s wants and needs. When the sales advisor understands a customer, he or she can easily anticipate the customer’s needs and offer them the right products and services right for them.* |
| ***Be a sales consultant rather than a salesperson*** | * *Become an expert in understanding customer needs. This way, instead of simply trying to “sell” a product to a customer, you can suggest ways that your other products can serve the customer.* * *You are in the perfect place to make suggestions when you are a product expert and have insights to offer that the customer cannot find elsewhere. Expert understanding of customer needs make you come across as a sales consultant versus a person who just wants to sell something.* |
| ***Be relevant to the customer*** | * *Relevance is key in upselling. Few things annoy customers more than wading through products and services that are not relevant to their needs. Be sure to understand the customer’s needs and offer relevant products and services.* |
| ***Be proactive*** | * *Take note and anticipate what issues and problems the customer might have, then figure out solutions on their behalf.* * *For example, customers might not know about a product or an upgrade, or an extended warranty, unless you tell them.* |

**Question 18 (15 marks) KM03-IAC0302 and KM03-IAC0303**

18.1 What does “add-on sales” mean? Give 2 examples. (3 marks)

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| Sales advisors should consider ***additional*** products to offer the customer. This way, you increase sales and also profits for the business.  Examples of add-on sales by offering additional products:   * If a customer who buys an iPad indicated that he will also listen to music on the iPad, you may suggest that a good set of earphones will enhance his music experience. * If selling a laptop computer, you may suggest a bag for the laptop. |

18.2 Why are add-on sales important for the business? List and explain 5 benefits   
 (10 marks)

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| * ***Increased profits***. Increased sales lead to increased profits. * ***Increased customer loyalty.*** The point of upselling is to give the customer all their options so they can make an informed choice. Customer loyalty increase when customers feel that you care about their needs. * ***Increase return on investment.*** Getting new customers can be costly. Upselling to customers allows the business to receive a better return on your investment – the business already did the hard work of marketing, finding and selling successfully to the customer. * ***Increased customer lifetime value.*** Upselling will not only bring in a greater initial profit after gaining the customer, but the overall value of sales to the customer over the course of their lifetime will also be greater. Higher customer lifetime value means each customer generates more revenue for the store without the business having to invest anything extra. * ***Convenience and flexibility for customers.*** Customers also benefit from upselling. Many customers do not want to shop around when they need a certain product or service. By offering them more choices or relevant add-ons, they do not have to take a risk with a new company to get what they need. |

18.3 Explain the impact of add-on sales for the sales advisor. (2 marks)

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| It helps increase sales and achieving the sales advisor’s sales targets. |

**Question 19 (3 marks) KM03-IAC0304**

Explain the concept of selling alternative products. (3 marks)

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| * From time to time, a product that a customer asks for, is not available. Instead of just informing the customer that the product is out of stock or that the store does not dell the specific product, the sales advisor should offer an alternative product. * That way, the store does not lose a sale. * It may also be necessary to recommend an alternative product when there is an objection, for example, that a fridge is too large for the customer’s kitchen, or too pricey. |

**Question 20 (3 marks) KM03-IAC0305**

List 3 types of supplementary services offered in the wholesale and retail industry)

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| * Financial services such as cash withdrawal at the pay point in a supermarket where large amounts of cash are received from customers. * Consultation, for example, advice on types of fabric more suitable for curtains, upholstery, etc. * Upholstery service at an outlet that sells upholstery fabrics. * Landscaping design offered by a plant nursery. * Delivery for furniture and appliances. * Payment facilities for utility accounts such as municipal rates and taxes or telephone accounts. * Recycling, for example a recycle box for used batteries or globes. |

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| 14 Assessment guide for practical training |

All requirements for practical training are provided in the Practical guide and log.

The assessor should ensure that all practical training activities are completed and signed off by the facilitator/manager.

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| 15 Assessment feedback report |

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| Learner full names and surname |  |
| Learner ID number |  |
| Programme completed | Retail sales advisor  Qual 99669 |
| Assessor full names and surname |  |
| Assessor ID number |  |

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| **Knowledge subjects** | | |
| **Number**  **Title** | **C/NYC** | **Feedback to learner** |
| KM-01-KT01: Principles of interacting with different types of wholesale and retail customers |  |  |
| KM-01-KT02: Creating a positive image in a sales environment |  |  |
| KM-01-KT03: Communicating with wholesale and retail customers |  |  |
| KM-01-KT04: The concept and importance of resolving customer queries |  |  |
| KM-01-KT05: Handling customer complaints |  |  |
| KM-02-KT01: The different types of service environments |  |  |
| KM-02-KT02: Concepts and principles of service excellence |  |  |
| KM-02-KT03: Principles of building customer relationships |  |  |
| KM-03-KT01: Concepts and principles of managing own sales |  |  |
| KM-03-KT02: Concepts and principles of the sales cycle |  |  |
| KM-03-KT03: Principles of advanced selling skills |  |  |
| **Practical skill modules** | | |
| **Number**  **Title** | **C/NYC** | **Feedback to learner** |
| 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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| **Work experience modules** | | |
| **Number**  **Title** | **C/NYC** | **Feedback to learner** |
| 522301001-WM-01, Processes and procedures for attending to different types of customers, handling customer queries and communicating with customers |  |  |
| 522301001-WM-02, Processes and procedures for providing customer service |  |  |
| 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 |  |  |

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| Assessor’s overall finding (C/NYC) |  | | |
| Assessor comments | | | |
| Assessor’s signature |  | Date |  |
| Moderator full names and surname |  | | |
| Moderator ID number |  | | |
| Moderator comments | | | |
| Moderator’s signature |  | Date |  |
| Learner’s signature |  | Date |  |

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| 16 Assessor review of assessment – Report to moderator |

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| **ASSESSOR REVIEW DOCUMENT**  Please complete this review document to enable us to finalise the assessment process | | | |
| **Programme Name and ID** | Qual 99669 Retail sales advisor | **Date of Review** |  |
| **Assessor** |  | **Moderator** |  |
| **Assessor Registration ID** |  | **Moderator Registration ID** |  |
| **Organisation** |  | **Organisation** |  |

Dear Moderator,

This is a review on the assessment against the qualification:

**Assessment schedule**

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity** | **Proposed date(s) and time** | **Actual date and time** | **Comments** |
| **Pre-assessment meeting** |  |  |  |
| **Assessment** |  |  |  |
| **Feedback to candidate and relevant parties** |  |  |  |
| **Moderation** |  |  |  |

**List of candidates**

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| **First names and surname** | **ID** | **Outcome of the assessment** |
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I used the following for the assessment:

1. Assessment plan (Alignment matrix)
2. Assessment instruments in the Learner assessment guide
3. Assessment guide (Model answers/Evidence guide) in the Assessment guide for assessor

**Review of the assessment plan**

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| **Criteria** | **Y/N** | **Comment / Action required** |
| Is there an assessment plan (alignment document) available which demonstrates alignment of instruments with the assessment instruments and tools |  |  |
| Are there sufficient questions to cover the **knowledge competence** as required by the qualification? |  |  |
| Are there sufficient checklists to cover the **practical competence** as required by the qualification? |  |  |

**Review of the assessment instruments**

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| **Criteria** | **Y/N** | **Comment / Action required** |
| Are the memoranda available for the questions? |  |  |
| Do the instruments cover all the practical skills as required? |  |  |

**Review of the assessment principles**

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| **Criteria** | **Y/N** | **Comment / Action required** |
| Are there assessment instruments for **ALL** the assessment criteria? (Principle: Sufficiency) |  |  |
| Do the assessment instruments clearly relate to the specific outcomes? (Principle: Validity) |  |  |
| Does the assessment plan indicate which assessment instruments must be used for each specific outcome? (Principle: Systematic) |  |  |
| Are the evidence requirements relevant to the qualification? (Principle: Validity) |  |  |
| Were the evidences verified to be contributable to the specific candidate? (Principle: Authenticity) Further: The evidence mirrors the candidates’ natural work and is not fabricated. |  |  |
| Does the evidence prove that the candidates can perform the outcomes at the time when the assessor declared them competent (Principle: Currency). |  |  |
| Are the assessment methods suitable for the outcomes being assessed? (Principle: Appropriateness) |  |  |
| Is the assessment instruments manageable and user friendly? (Principle: Manageability) |  |  |
| Was the assessment conducted in a fair manner? (Principle: Fairness) |  |  |

**Review of the assessment process i.e. (prepare, conduct and feedback)**

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| **Criteria** | **Y/N** | **Comment / Action required** |
| The assessment process was transparent, in that the candidates were allowed to provide input to the accumulation of evidence. |  |  |
| The assessment process was transparent in that the candidates had a clear understanding of the evidence requirements and the criteria against which the evidence would be judged. |  |  |
| The assessment process is systematic. |  |  |
| The assessor confirms being able to make the same judgements again, in similar circumstances. |  |  |
| The assessment methods are suitable for the outcomes being assessed. |  |  |
| The assessment does not present any barriers for the candidates. |  |  |
| All special needs have been catered for and considered during the assessment. |  |  |
| Evidence collected is integrated into work, i.e. it mirrors the candidate’s natural work environment and is not fabricated evidence. |  |  |
| Feedback mechanisms are appropriate and sufficient. |  |  |

**Review of the qualification**

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| Do you agree with the title of the qualification? | **Yes** | **No** | |
| If “no”, please suggest an alternative with a brief motivation for the change | | | |
| Do you agree with the purpose of the qualification? | **Yes** | | **No** |
| If “no”, please suggest an alternative with a brief motivation for the change | | | |
| Do you agree with the specific outcomes as an indication of the elements of the qualification? | **Yes** | | **No** |
| If “no”, please suggest an alternative with a brief motivation for the change | | | |
| Do you agree with the various range statements as a means to provide context and scope for the unit standard, as well as to clarify the use of terms, exclusions and inclusions? | **Yes** | | **No** |
| If “no”, please suggest an alternative with a brief motivation for the change. | | | |
| Do you agree with the assessment criteria (for each specific outcome) | **Yes** | | **No** |
| If “no”, please suggest an alternative with a brief motivation for the change | | | |

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| 17 Moderator evaluation on assessment |

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| **Moderation report on assessments** | |
| Name and surname of moderator |  |
| Registration number or ID of moderator |  |
| Qualification number and title |  |

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| **Training provider information** | | | |
| Name of provider |  | | |
| Accreditation number |  | | |
| Contact person |  | | |
| Telephone |  | Mobile number |  |
| e-mail address |  | | |

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| **ASSESSMENT INFORMATION** | |
| Assessment date/timeframe |  |
| Names of assessors |  |
| Assessor information | * Assessors have the required subject matter expertise * Assessors are registered and their scope cover the qualification/skills programme/unit standard9s) |

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| **Documentation for moderation** | | | |
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| **Sampling** | | | |
| Sample details | **Total number of portfolios** | **Sample percentage (at least 10% of assessments)** | **Sample method** |
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| **Validation of assessors and candidate allocation (manageable ratio within the timeframe)** | | | |
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| **Special needs** | | | |
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| **Planning and preparation for assessment and assessment instruments** | | | |
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| **Comments on assessments conducted – Feedback to the assessor (advice, support and guidance)** | | | |
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| **Signature** |  | **Date** |  |