



		Curriculum Document		
Curriculum Code		Curriculum Title		
522301001		Retail Sales Advisor		
	Name	Email	Phone	Logo
Development Quality Partner	W&RSETA	imarrian@wrseta.org.za	012-6229500	

Learner QDF Signature

Date

QDF Signature

Date

DQP Representative Signature

Date

Table of content

SECTION 1: CURRICULUM SUMMARY	4
1. Occupational Information.....	4
1.1 Associated Occupation	4
1.2 Occupation or Specialisation Addressed by this Curriculum	4
1.3 Alternative Titles used by Industry	4
2. Curriculum Information.....	4
2.1 Curriculum Structure.....	4
2.2 Entry Requirements.....	5
3. Assessment Quality Partner Information	6
4. Part Qualification Curriculum Structure.....	6
SECTION 2: OCCUPATIONAL PROFILE	11
1. Occupational Purpose.....	11
2. Occupational Tasks.....	11
3. Occupational Task Details.....	11
3.1. Attend to different types of customers and resolve queries (NQF Level)	11
3.2. Provide customer service and build customer relationships (NQF Level)	11
3.3. Sell products in a full service retail and wholesale sales environment (NQF Level)	11
SECTION 3: CURRICULUM COMPONENT SPECIFICATIONS.....	13
SECTION 3A: KNOWLEDGE MODULE SPECIFICATIONS	13
List of Knowledge Modules for which Specifications are included.....	13
1. 522301001-KM-01, Principles of attending to different types of customers and resolving customer queries impacting on sales, NQF Level 2, Credits 4	14
2. 522301001-KM-02, Principles of service excellence and building customer relationships in retail and wholesale sales, NQF Level 3, Credits 3	18
3. 522301001-KM-03, Concepts and principles of selling in a full service retail and wholesale environment, NQF Level 3, Credits 4	21
4. 522301001-KM-04, Monitoring and Control of Perishable Goods and Cold Chain Compliance, NQF Level 3, Credits 12.....	24
5. 522301001-KM-05, Perishable Goods and Cold Chain Requirements, NQF Level 2, Credits 8.....	28

6. 522301001-KM-06, Merchandising and Replenishment in Wholesale and Retail Stores, NQF Level 2, Credits 6.....	37
SECTION 3B: PRACTICAL SKILL MODULE SPECIFICATIONS.....	44
List of Practical Skill Module Specifications.....	44
1. 522301001-PM-01, Interact with different types of customers and present a positive image, NQF Level 2, Credits 2	45
2. 522301001-PM-02, Handle customer queries and complaints, NQF Level 2, Credits 248	
3. 522301001-PM-03, Provide customer service and build customer relationships, NQF Level 3, Credits 2	50
4. 522301001-PM-04, Sell products to customers using the sales cycle, NQF Level 3, Credits 3	54
5. 522301001-PM-05, Use advanced selling techniques, NQF Level 3, Credits 2	57
6. 522301001-PM-06, Coordinate the Activities in the Perishable Goods Department Ensuring Cold Chain Compliance is Achieved and Maintained, NQF Level 3, Credits 12	60
7. 522301001-PM-07, Handle and Move Perishable Goods and Replenish Shelves According to Cold Chain Requirements, NQF Level 2, Credits 6	66
8. 522301001-PM-08, Merchandise Stock According to Store Planogram/Wire diagram, NQF Level 2, Credits 5.....	75
SECTION 3C: WORK EXPERIENCE MODULE SPECIFICATIONS.....	82
List of Work Experience Module Specifications	82
1. 522301001-WM-01, Processes and procedures for attending to different types of customers, handling customer queries and communicating with customers, NQF Level 2, Credits 1083	
2. 522301001-WM-02, Processes and procedures for providing customer service, NQF Level 3, Credits 8	85
3. 522301001-WM-03, Processes and procedures for selling products to customers using the sales cycle and advanced selling techniques in a full service wholesale or retail sales environment, NQF Level 03, Credits 14.....	87
4. 522301001-WM-04, Cold Chain Control and Perishable Goods Monitoring, NQF Level 3, Credits 12.....	90
5. 522301001-WM-05, Perishable Goods Department and Cold Chain Requirements, NQF Level 2, Credits 11.....	94
6. 522301001-WM-06, In-store Merchandising Procedures, NQF Level 2, Credits 15	99
SECTION 4: STATEMENT OF WORK EXPERIENCE.....	104

SECTION 1: CURRICULUM SUMMARY

1. Occupational Information

1.1 Associated Occupation

522301: Sales Assistant (General)

1.2 Occupation or Specialisation Addressed by this Curriculum

522301001: Retail Sales Advisor

1.3 Alternative Titles used by Industry

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

2. Curriculum Information

2.1 Curriculum Structure

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

Knowledge Modules:

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

- 522301001-KM-04, Monitoring and Control of Perishable Goods and Cold Chain Compliance, NQF Level 3, Credits 12
- 522301001-KM-05, Perishable Goods and Cold Chain Requirements, NQF Level 2, Credits 8
- 522301001-KM-06, Merchandising and Replenishment in Wholesale and Retail Stores, NQF Level 2, Credits 6

Total number of credits for Knowledge Modules: 37

Practical Skill Modules:

- 522301001-PM-01, Interact with different types of customers and present a positive image, NQF Level 2, Credits 2
- 522301001-PM-02, Handle customer queries and complaints, NQF Level 2, Credits 2
- 522301001-PM-03, Provide customer service and build customer relationships, NQF Level 3, Credits 2
- 522301001-PM-04, Sell products to customers using the sales cycle, NQF Level 3, Credits 3
- 522301001-PM-05, Use advanced selling techniques, NQF Level 3, Credits 2
- 522301001-PM-06, Coordinate the Activities in the Perishable Goods Department Ensuring Cold Chain Compliance is Achieved and Maintained, NQF Level 3, Credits 12
- 522301001-PM-07, Handle and Move Perishable Goods and Replenish Shelves According to Cold Chain Requirements, NQF Level 2, Credits 6
- 522301001-PM-08, Merchandise Stock According to Store Planogram/Wire diagram, NQF Level 2, Credits 5

Total number of credits for Practical Skill Modules: 34

This qualification also requires the following Work Experience Modules:

- 522301001-WM-01, Processes and procedures for attending to different types of customers, handling customer queries and communicating with customers, NQF Level 2, Credits 10
- 522301001-WM-02, Processes and procedures for providing customer service, NQF Level 3, Credits 8
- 522301001-WM-03, Processes and procedures for selling products to customers using the sales cycle and advanced selling techniques in a full service wholesale or retail sales environment, NQF Level 03, Credits 14
- 522301001-WM-04, Cold Chain Control and Perishable Goods Monitoring, NQF Level 3, Credits 12
- 522301001-WM-05, Perishable Goods Department and Cold Chain Requirements, NQF Level 2, Credits 11
- 522301001-WM-06, In-store Merchandising Procedures, NQF Level 2, Credits 15

Total number of credits for Work Experience Modules: 70

2.2 Entry Requirements

NQF Level 1 with Mathematics

3. Assessment Quality Partner Information

Name of body: W&RSETA

Address of body:

Hennops House 1303

Heuwel Avenue (Cnr Lenchen South and Heuwel)

Centurion,

Pretoria 0157

Contact person name: Inger Marrian

Contact person work telephone number: 012-6229500

4. Part Qualification Curriculum Structure

Part Qualification 1:

Title:

Retail Sales Advisor, NQF Level 3, Credits 54

Purpose:

The purpose of this part qualification is to prepare a learner to operate as a Retail Sales Advisor and sell goods and services such as fast moving consumer goods (FMCG), clothing, furniture and specialty merchandise in a retail or wholesale environment.

Applicable Modules (Rules of Combination)

Knowledge Modules:

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

Total number of credits for Knowledge Modules: 11

Practical Skill Modules:

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

- 522301001-PM-05, Use advanced selling techniques, NQF Level 3, Credits 2

Total number of credits for Practical Skill Modules: 11

This qualification also requires the following Work Experience Modules:

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

Total number of credits for Work Experience Modules: 32

Assessment Qualification Standards:

- Attend to customers and handle their queries (15%)
- Build relationships with customers by providing quality service (15%)
- Sell goods or services to customers (25%)

Part Qualification 2:

Title:

Customer Service Assistant, NQF Level 3, Credits 31

Purpose:

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

Applicable Modules (Rules of Combination)

Knowledge Modules:

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

Total number of credits for Knowledge Modules: 7

Practical Skill Modules:

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

Total number of credits for Practical Skill Modules: 6

This qualification also requires the following Work Experience Modules:

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

Total number of credits for Work Experience Modules: 18

Assessment Qualification Standards:

- Attend to customers and handle their queries (15%)
- Build relationships with customers by providing quality service (15%)

Part Qualification 3:

Title:

Perishable Goods Department Coordinator, NQF Level 3, Credits 79

Purpose:

The purpose of this part qualification is to prepare a learner to operate as a Perishable Goods Department Coordinator and to coordinate staff and the supply of perishable goods, whilst controlling and maintaining compliance to company standards and safety

Applicable Modules (Rules of Combination)

Knowledge Modules:

- 522301001-KM-01, Principles of attending to different types of customers and resolving customer queries impacting on sales, NQF Level 2, Credits 4
- 522301001-KM-04, Monitoring and Control of Perishable Goods and Cold Chain Compliance, NQF Level 3, Credits 12
- 522301001-KM-05, Perishable Goods and Cold Chain Requirements, NQF Level 2, Credits 8

Total number of credits for Knowledge Modules: 24

Practical Skill Modules:

- 522301001-PM-01, Interact with different types of customers and present a positive image, NQF Level 2, Credits 2
- 522301001-PM-02, Handle customer queries and complaints, NQF Level 2, Credits 2
- 522301001-PM-06, Coordinate the Activities in the Perishable Goods Department Ensuring Cold Chain Compliance is Achieved and Maintained, NQF Level 3, Credits 12
- 522301001-PM-07, Handle and Move Perishable Goods and Replenish Shelves According to Cold Chain Requirements, NQF Level 2, Credits 6

Total number of credits for Practical Skill Modules: 22

This qualification also requires the following Work Experience Modules:

- 522301001-WM-01, Processes and procedures for attending to different types of customers, handling customer queries and communicating with customers, NQF Level 2, Credits 10
- 522301001-WM-04, Cold Chain Control and Perishable Goods Monitoring, NQF Level 3, Credits 12
- 522301001-WM-05, Perishable Goods Department and Cold Chain Requirements, NQF Level 2, Credits 11

Total number of credits for Work Experience Modules: 33

Assessment Qualification Standards:

- Attend to customers and handle their queries (15%)
- Coordinate perishable goods displays, sales and compliance with cold chain requirements and legislation (15%)
- Replenish chillers, freezer and shelves with perishable goods and maintain cold chain requirements (15%)

Part Qualification 4:

Title:

Perishable Goods Replenisher, NQF Level 2, Credits 25

Purpose:

The purpose of this part qualification is to prepare a learner to operate as a Perishable Goods Replenisher and to handle, move and display perishable goods according to produce requirements and maintain cold chain standards whereby minimising stock shrinkage

Applicable Modules (Rules of Combination)

Knowledge Modules:

- 522301001-KM-05, Perishable Goods and Cold Chain Requirements, NQF Level 2, Credits 8

Total number of credits for Knowledge Modules: 8

Practical Skill Modules:

- 522301001-PM-07, Handle and Move Perishable Goods and Replenish Shelves According to Cold Chain Requirements, NQF Level 2, Credits 6

Total number of credits for Practical Skill Modules: 6

This qualification also requires the following Work Experience Modules:

- 522301001-WM-05, Perishable Goods Department and Cold Chain Requirements, NQF Level 2, Credits 11

Total number of credits for Work Experience Modules: 11

Assessment Qualification Standards:

- Replenish chillers, freezer and shelves with perishable goods and maintain cold chain requirements (15%)

Part Qualification 5:

Title:

Shelf Filler, NQF Level 2, Credits 26

Purpose:

The purpose of this part qualification is to prepare a learner to operate as a Shelf Filler and to apply merchandising principles and conduct merchandising activities to maintain display areas in compliance with company and safety standards

Applicable Modules (Rules of Combination)

Knowledge Modules:

- 522301001-KM-06, Merchandising and Replenishment in Wholesale and Retail Stores, NQF Level 2, Credits 6

Total number of credits for Knowledge Modules: 6

Practical Skill Modules:

- 522301001-PM-08, Merchandise Stock According to Store Planogram/Wire diagram, NQF Level 2, Credits 5

Total number of credits for Practical Skill Modules: 5

This qualification also requires the following Work Experience Modules:

- 522301001-WM-06, In-store Merchandising Procedures, NQF Level 2, Credits 15

Total number of credits for Work Experience Modules: 15

Assessment Qualification Standards:

- Replenish shelves and merchandise displays according to merchandising requirements and standards whereby minimizing stock shrinkage (15%)

SECTION 2: OCCUPATIONAL PROFILE

1. Occupational Purpose

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

2. Occupational Tasks

- Attend to different types of customers and resolve queries. (NQF Level 2)
- Provide customer service and build customer relationships. (NQF Level 3)
- Sell products in a full service retail and wholesale sales environment. (NQF Level 3)
- Coordinate the activities of staff in the perishable goods department and maintain compliance with cold chain requirements and company and safety standards. (NQF 3)
- Handle, move and display perishable goods according to produce requirements and maintain cold chain standards whereby minimising stock shrinkage. (NQF2)
- Apply merchandising principles and conduct merchandising activities to maintain display areas in compliance with company and safety standards. (NQF2)

3. Occupational Task Details

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

Unique Product or Service:

Attended customers and resolved queries

Occupational Responsibilities:

Occupational Contexts:

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

Unique Product or Service:

Optimised customer relationships

Occupational Responsibilities:

Occupational Contexts:

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

Unique Product or Service:

Sales targets met or exceeded

Occupational Responsibilities:

Occupational Contexts:

3.4. Coordinate the activities of staff in the perishable goods department and maintain compliance with cold chain requirements and company and safety standards. (NQF 3)

Unique Product or Service:

Sales targets met or exceeded

Occupational Responsibilities:

Occupational Contexts:

3.5. Handle, move and display perishable goods according to produce requirements and maintain cold chain standards whereby minimising stock shrinkage. (NQF2)

Unique Product or Service:

Sales targets met or exceeded

Occupational Responsibilities:

Occupational Contexts:

3.6. Apply merchandising principles and conduct merchandising activities to maintain display areas in compliance with company and safety standards. (NQF2)

Unique Product or Service:

Sales targets met or exceeded

Occupational Responsibilities:

Occupational Contexts:

SECTION 3: CURRICULUM COMPONENT SPECIFICATIONS

SECTION 3A: KNOWLEDGE MODULE SPECIFICATIONS

List of Knowledge Modules for which Specifications are included

- 522301001-KM-01, Principles of attending to different types of customers and resolving customer queries impacting on sales, NQF Level 2, Credits 4
- 522301001-KM-02, Principles of service excellence and building customer relationships in retail and wholesale sales, NQF Level 3, Credits 3
- 522301001-KM-03, Concepts and principles of selling in a full service retail and wholesale environment, NQF Level 3, Credits 4
- 522301001-KM-04, Monitoring and Control of Perishable Goods and Cold Chain Compliance, NQF Level 3, Credits 12
- 522301001-KM-05, Perishable Goods and Cold Chain Requirements, NQF Level 2, Credits 8
- 522301001-KM-06, Merchandising and Replenishment in Wholesale and Retail Stores, NQF Level 2, Credits 6

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

1.1 Purpose of the Knowledge Modules

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

The learning will enable learners to demonstrate an understanding of:

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

1.2 Guidelines for Topics

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

Topic elements to be covered include:

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

Internal Assessment Criteria and Weight

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

(Weight 20%)

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

Topic elements to be covered include:

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

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

Internal Assessment Criteria and Weight

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

(Weight 20%)

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

Topic elements to be covered include:

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

Internal Assessment Criteria and Weight

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

(Weight 25%)

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

Topic elements to be covered include:

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

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

Internal Assessment Criteria and Weight

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

(Weight 20%)

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

Topic elements to be covered include:

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

Internal Assessment Criteria and Weight

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

(Weight 15%)

1.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Training materials, Learner Guide, Facilitator Guide, Handouts, Visual Aids

Human Resource Requirements:

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

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

Legal Requirements:

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

1.4 Exemptions

- None

DRAFT

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

2.1 Purpose of the Knowledge Modules

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

The learning will enable learners to demonstrate an understanding of:

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

2.2 Guidelines for Topics

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

Topic elements to be covered include:

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

Internal Assessment Criteria and Weight

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

(Weight 15%)

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

Topic elements to be covered include:

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

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

Internal Assessment Criteria and Weight

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

(Weight 50%)

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

Topic elements to be covered include:

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

Internal Assessment Criteria and Weight

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

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

(Weight 35%)

2.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Training materials, Learner Guide, Facilitator Guide, Handouts, Visual Aids

Human Resource Requirements:

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

Legal Requirements:

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

2.4 Exemptions

- None

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

3.1 Purpose of the Knowledge Modules

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

The learning will enable learners to demonstrate an understanding of:

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

3.2 Guidelines for Topics

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

Topic elements to be covered include:

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

Internal Assessment Criteria and Weight

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

(Weight 15%)

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

Topic elements to be covered include:

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

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

Internal Assessment Criteria and Weight

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

(Weight 70%)

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

Topic elements to be covered include:

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

Internal Assessment Criteria and Weight

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

(Weight 15%)

3.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Training materials, Learner Guide, Facilitator Guide, Handouts, Visual Aids

Human Resource Requirements:

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

Legal Requirements:

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

3.4 Exemptions

- None

4. 522301001-KM-04, Monitoring and Control of Perishable Goods and Cold Chain Compliance, NQF Level 3, Credits 12

4.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of monitoring personnel and activities in the perishable goods section in order to achieve and maintain cold chain compliance

The learning will enable learners to demonstrate an understanding of:

- KM-04-KT01: Legislation, standards, policies, procedures and compliance (15%)
- KM-04-KT02: Coordinating activities of perishable good replenishers (25%)
- KM-04-KT03: Coordinating and maintaining stock levels (20%)
- KM-04-KT04: Audits and inspections (15%)
- KM-04-KT05: Planning for special events in the perishable goods department (25%)

4.2 Guidelines for Topics

4.2.1. KM-04-KT01: Legislation, standards, policies, procedures and compliance (15%)

Topic elements to be covered include:

- KT0101 Legislation (labour, wine licences, sectorial determination, bylaws, CPA and OHSA)
- KT0102 National and international standards and requirements
- KT0103 Policies and standard operating procedures
- KT0104 Compliance and individual obligations
- KT0105 Transgressions and non-compliances
- KT0106 Dealing with incidents and emergencies
- KT0107 Record keeping: basic employer/employee relations

Internal Assessment Criteria and Weight

- IAC0101 Explain legislation pertaining to the Wholesale and Retail outlet is identified and the compliance requirements pertaining to area of work
- IAC0102 Evaluate the function of policies and procedures in the workplace
- IAC0103 List compliance implications of legislation

(Weight 15%)

4.2.2. KM-04-KT02: Coordinating activities of perishable good replenishers (25%)

Topic elements to be covered include:

- KT0201 Staff scheduling
- KT0202 Meeting procedures

- KT0203 Delegating, planning, monitoring, organising, control
- KT0204 Prioritising and goal setting
- KT0205 Time management
- KT0206 Team management
- KT0207 Coaching and mentoring
- KT0208 Monitoring performance
- KT0209 Communication

Internal Assessment Criteria and Weight

- IAC0201 Discuss the role and function of the coordinator in the workplace
- IAC0202 List and evaluate the tasks and activities of the coordinator
- IAC0203 Explain principles of delegating, planning, monitoring, organising, control in terms of the coordinator role and function
- IAC0204 Analyse the nature of interaction with management and subordinates

(Weight 25%)

4.2.3. KM-04-KT03: Coordinating and maintaining stock levels (20%)

Topic elements to be covered include:

- KT0301 Shrinkage and waste
- KT0302 Life span of products
- KT0303 Stock forecasting (basic principles)
- KT0304 Receiving and dispatching stock
- KT0305 Documentation validity and control
- KT0306 Minimum stock levels
- KT0307 Storage and packaging requirements
- KT0308 Disposal of spoiled or contaminated stock

Internal Assessment Criteria and Weight

- IAC0301 Describe basic concepts of stock levels, stock rotation, stock take variances and stock shortages and how these pertain to a Wholesale and Retail outlet
- IAC0302 Analyse aspects of shrinkage, wastage, theft, stock shortages and over stock, identify causes identified and investigate possible solutions
- IAC0303 Describe basic concepts of quality, quantity, credit notes, invoices, labelling and how these pertain to a Wholesale and Retail outlet

(Weight 20%)

4.2.4. KM-04-KT04: Audits and inspections (15%)

Topic elements to be covered include:

- KT0401 Types and purpose of internal and external audits
- KT0402 Difference between audits and inspections
- KT0403 Audit and inspection procedures
- KT0404 Audit and inspection documentation
- KT0405 Traceability and record keeping

Internal Assessment Criteria and Weight

- IAC0401 Reason types and purpose of audits are analysed and the implications for the workplace
- IAC0402 Analyse compliance aspects and reason the implications for the workplace

(Weight 15%)

4.2.5. KM-04-KT05: Planning for special events in the perishable goods department (25%)

Topic elements to be covered include:

- KT0501 Types of special events
- KT0502 Basic understanding of budgets, targets and profits
- KT0503 Planning of an event
- KT0504 Basic forecasting principles
- KT0505 Ordering, receiving and allocating stock space
- KT0506 Signage
- KT0507 Allocating tasks as per plan
- KT0508 Contingencies
- KT0509 Monitor and evaluate the event

Internal Assessment Criteria and Weight

- IAC0501 Discuss basic planning, organising, monitoring and evaluating of an event and related activities in terms of contributing to the success and effectiveness of the event
- IAC0502 Identify and analyse various types of displays in terms of advantages and disadvantages
- IAC0503 Explain basic principles of format, content (product, quality, quantity and cross-merchandising), composition, interpretation of the purpose of the display, longevity and replenishment of products in display when planning a display

(Weight 25%)

4.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all topics in all the knowledge modules

Human Resource Requirements:

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

Legal Requirements:

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

4.4 Exemptions

- None

5. 522301001-KM-05, Perishable Goods and Cold Chain Requirements, NQF Level 2, Credits 8

5.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of the characteristics of perishable goods and cold chain requirements

The learning will enable learners to demonstrate an understanding of:

- KM-05-KT01: The wholesale and retail sector (10%)
- KM-05-KT02: Basic product knowledge: Meat/fish/fruit and veg/deli and dairy/short shelf life goods (5%)
- KM-05-KT03: Specialised product knowledge: Meat/fish/fruit and veg/deli and dairy/short shelf life goods (5%)
- KM-05-KT04: Cold chain principles and rules (5%)
- KM-05-KT05: Waste and disposal of food products (5%)
- KM-05-KT06: Personal and work area hygiene (5%)
- KM-05-KT07: Food safety requirements (10%)
- KM-05-KT08: Perishable goods identification and handling (5%)
- KM-05-KT09: Store layout (5%)
- KM-05-KT10: Stock replenishment (5%)
- KM-05-KT11: Shrinkage and losses (10%)
- KM-05-KT12: Occupational health and safety (5%)
- KM-05-KT13: Technology used in the retail and wholesale sector (5%)
- KM-05-KT14: On-line shopping (5%)
- KM-05-KT15: Labelling and weighing of perishable foods (5%)
- KM-05-KT16: Environmental awareness (5%)
- KM-05-KT17: Customers and customer care (5%)

5.2 Guidelines for Topics

5.2.1. KM-05-KT01: The wholesale and retail sector (10%)

Topic elements to be covered include:

- KT0101 Basic understanding of the Consumer Protection Act (PCA)
- KT0102 Sub-sectors and categories applicable to the wholesale and retail sector
- KT0103 Stakeholders in the wholesale/retail sector
- KT0104 Consumer profiles and shopping patterns

- KT0105 The various operational functions in wholesale/retail and their main task
- KT0106 Stock flow through the business
- KT0107 The flow of cash through the business
- KT0108 The support functions applicable to the wholesale and retail sector
- KT0109 The concept of wholesale and retail systems and sub-systems and how they impact on each other
- KT0110 Impact of own job on other internal stakeholders of the organisation

Internal Assessment Criteria and Weight

- IAC0101 Demonstrate a basic understanding of the wholesale and retail sector and its intricacies
- IAC0102 Explain the implications of the CPA for the perishable goods section

(Weight 10%)

5.2.2. KM-05-KT02: Basic product knowledge: Meat/fish/fruit and veg/deli and dairy/short shelf life goods (5%)

Topic elements to be covered include:

- KT0201 Basic food groups
- KT0202 Different diets such as religious requirements, vegan, vegetarian, low carb and diabetes
- KT0203 Allergies such as gluten, dairy, nut, etc.
- KT0204 Healthy eating such as balanced meals
- KT0205 Contamination such as bacteria, moulds and pests

Internal Assessment Criteria and Weight

- IAC0201 Identify types of products
- IAC0202 Describe products in terms of characteristics and requirements

(Weight 5%)

5.2.3. KM-05-KT03: Specialised product knowledge: Meat/fish/fruit and veg/deli and dairy/short shelf life goods (5%)

Topic elements to be covered include:

- KT0301 Characteristics of products
- KT0302 Requirements for cold storage and handling
- KT0303 Customer requirements
- KT0304 Types and cuts of meat

- KT0305 Types of fish and endangered species
- KT0306 Kinds of cheeses and other dairy products

Internal Assessment Criteria and Weight

- IAC0301 Identify types of specialised products
- IAC0302 Describe specialised products in terms of characteristics and requirements

(Weight 5%)

5.2.4. KM-05-KT04: Cold chain principles and rules (5%)

Topic elements to be covered include:

- KT0401 The concept of the cold chain
- KT0402 Temperature and temperature measurement
- KT0403 Food products that require temperature control
- KT0404 Store, move and display of temperature controlled foods
- KT0405 Monitoring of temperatures and corrective action

Internal Assessment Criteria and Weight

- IAC0401 Demonstrate a basic understanding of the cold chain principles and requirements
- IAC0402 Explain the effect of not maintaining correct temperatures
- IAC0403 Justify the importance of continuous monitoring and maintaining temperatures

(Weight 5%)

5.2.5. KM-05-KT05: Waste and disposal of food products (5%)

Topic elements to be covered include:

- KT0501 Legal requirements for disposal of food products
- KT0502 Organisational requirements for disposal of food products
- KT0503 Identification of food products which need to be disposed of

Internal Assessment Criteria and Weight

- IAC0501 Define waste in the perishable goods section
- IAC0502 Explain the legal requirements for the disposal of food products

(Weight 5%)

5.2.6. KM-05-KT06: Personal and work area hygiene (5%)

Topic elements to be covered include:

- KT0601 Legislative requirements
- KT0602 Personal hygiene
- KT0603 Work area hygiene
- KT0604 Equipment hygiene
- KT0605 Contamination

Internal Assessment Criteria and Weight

- IAC0601 Argue the importance of and reasons for personal hygiene
- IAC0602 Argue the importance of work area hygiene and methods to maintain it

(Weight 5%)

5.2.7. KM-05-KT07: Food safety requirements (10%)

Topic elements to be covered include:

- KT0701 Legislative requirements
- KT0702 Contamination
- KT0703 Disposal and waste
- KT0704 Various forms of micro-organisms that affect food
- KT0705 Sources of micro-organisms and how they spread
- KT0706 Critical control points for food contamination
- KT0707 Measures to prevent contamination of food
- KT0708 Pests
- KT0709 The effects of unsafe food on customer service and the organisation

Internal Assessment Criteria and Weight

- IAC0701 Explain food safety principles with reference to legislation
- IAC0702 Discuss the concept of contamination, how it is caused and how it can be prevented

(Weight 10%)

5.2.8. KM-05-KT08: Perishable goods identification and handling (5%)

Topic elements to be covered include:

- KT0801 Visual recognition
- KT0802 Stock keeping unit code

- KT0803 Tickets and labels
- KT0804 Legal requirements
- KT0805 Packing different kinds of foods
- KT0806 Use of weighing and pricing equipment
- KT0807 Handling, packing and stacking of delicate perishable goods

Internal Assessment Criteria and Weight

- IAC0801 Describe the correct methods to identify perishable goods
- IAC0802 List all information gleaned from labels and tickets
- IAC0803 Explain the correct use of weighing and pricing equipment in the perishable goods department

(Weight 5%)

5.2.9. KM-05-KT09: Store layout (5%)

Topic elements to be covered include:

- KT0901 Planograms and wire diagrams including definition, purpose and information contained
- KT0902 Various areas such as store, floor, aisle chiller and freezer lay-out
- KT0903 Basic principles of store layout
- KT0904 Grouping and layout of stocks in chillers and freezers
- KT0905 Space between aisles
- KT0906 Requirements for signage such as visibility, size and safety

Internal Assessment Criteria and Weight

- IAC0901 Define planograms/ wire diagrams and explain its functions
- IAC0902 Describe store layout and placement of chillers and freezers with reference to various areas and functions
- IAC0903 Evaluate signage requirements

(Weight 5%)

5.2.10. KM-05-KT10: Stock replenishment (5%)

Topic elements to be covered include:

- KT1001 Displaying perishable goods
- KT1002 Stacking specifications
- KT1003 Replenishment rules, methods and procedures

- KT1004 Counting, tallying and recording stock
- KT1005 Stock reports
- KT1006 Identifying over-stocks and stock shortages
- KT1007 Requirements and equipment used to move, store and stack stock
- KT1008 Stock rotation requirements

Internal Assessment Criteria and Weight

- IAC1001 Discuss stock replenishment principles with reference to displaying, stock rotation and stacking specifications
- IAC1002 Discuss the concepts of over-stock and stock shortage with reference to the effect on the business
- IAC1003 Describe the safe handling and moving of stock

(Weight 5%)

5.2.11. KM-05-KT11: Shrinkage and losses (10%)

Topic elements to be covered include:

- KT1101 The concept shrinkage and stock losses
- KT1102 The effect of shrinkage and losses on profit and employees
- KT1103 Causes and preventative methods for shrinkage and losses whilst marking merchandise and maintaining merchandise and displays
- KT1104 Minimise shrinkage
- KT1105 Monitor shrinkage
- KT1106 Procedures for responding to a shoplifting incident or suspecting someone of shoplifting

Internal Assessment Criteria and Weight

- IAC1101 Explain the concept of shrinkage and how it impacts on organisation
- IAC1102 Discuss ways in which shrinkage and losses occur in relation to marking and maintaining displays
- IAC1103 Explain ways and means to monitor and minimise shrinkage

(Weight 10%)

5.2.12. KM-05-KT12: Occupational health and safety (5%)

Topic elements to be covered include:

- KT1201 Applicable aspects of health, safety and environmental legislation.
- KT1202 Personal hygiene standards as required by law and the organisation

- KT1203 Protective clothing requirements
- KT1204 Handling and storing of cleaning chemicals and equipment
- KT1205 Cleaning and maintenance of equipment, fixtures and fittings
- KT1206 Procedure to follow in the event of incidents such as robbery and accidents involving customers or team members

Internal Assessment Criteria and Weight

- IAC1201 Argue the concepts compliance and non-compliance
- IAC1202 Elaborate the function of regulations and manufacturer specifications
- IAC1203 List safety measures applicable to the workplace and assess the implication for work activities such as racking and stacking, marking and displaying merchandise

(Weight 5%)

5.2.13. KM-05-KT13: Technology used in the retail and wholesale sector (5%)

Topic elements to be covered include:

- KT1301 Marking and labelling equipment
- KT1302 Scanners
- KT1303 Weighing equipment and calibration
- KT1304 Packaging material

Internal Assessment Criteria and Weight

- IAC1301 Analyse the safe use of equipment and the correct preparation of equipment

(Weight 5%)

5.2.14. KM-05-KT14: On-line shopping (5%)

Topic elements to be covered include:

- KT1401 Technology and equipment
- KT1402 Picking and packing
- KT1403 Transportation requirements
- KT1404 Order fulfilment
- KT1405 Order deployment

Internal Assessment Criteria and Weight

- IAC1401 Define the concept of on-line shopping
- IAC1402 Analyse the implications of on-line shopping on the organisation

(Weight 5%)

5.2.15. KM-05-KT15: Labelling and weighing of perishable foods (5%)

Topic elements to be covered include:

- KT1501 Importance of accuracy
- KT1502 Information required on the label
- KT1503 Label maintenance
- KT1504 Legal requirements (CPA) in respect of labelling and packaging of foods

Internal Assessment Criteria and Weight

- IAC1501 List all information to be included in the label
- IAC1502 Justify the importance of information accuracy and label maintenance
- IAC1503 Discuss legal requirements related to accuracy of information

(Weight 5%)

5.2.16. KM-05-KT16: Environmental awareness (5%)

Topic elements to be covered include:

- KT1601 The business and the community
- KT1602 Impact of humans on the environment
- KT1603 Green alternatives (water harvesting and solar)
- KT1604 Recycling and its role in the business

Internal Assessment Criteria and Weight

- IAC1601 Argue the responsibility of the organisation in terms of environmental impact
- IAC1602 Argue the responsibility of the individual in terms of environmental impact

(Weight 5%)

5.2.17. KM-05-KT17: Customers and customer care (5%)

Topic elements to be covered include:

- KT1701 Customer service and customer satisfaction
- KT1702 Personal appearance
- KT1703 Greeting customers
- KT1704 Communicating with customers (responding to queries)

- KT1705 Escalating queries

Internal Assessment Criteria and Weight

- IAC1701 Justify basic principles of customer service and customer satisfaction
- IAC1702 Analyse the effect of personal appearance and hygiene on the store and customers

(Weight 5%)

5.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all topics in all the knowledge modules

Human Resource Requirements:

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

Legal Requirements:

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

5.4 Exemptions

- None

6. 522301001-KM-06, Merchandising and Replenishment in Wholesale and Retail Stores, NQF Level 2, Credits 6

6.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of the basic principles of merchandising as it applies to a wholesale and retail store and maintaining displays and basic stock count principles

The learning will enable learners to demonstrate an understanding of:

- KM-06-KT01: Product knowledge (5%)
- KM-06-KT02: Handling and moving of merchandise (7%)
- KM-06-KT03: Store layout (8%)
- KM-06-KT04: Housekeeping (7%)
- KM-06-KT05: Merchandising (10%)
- KM-06-KT06: Displays (8%)
- KM-06-KT07: Replenishment and maintenance of displays (8%)
- KM-06-KT08: Shrinkage (8%)
- KM-06-KT09: Health, safety and compliance with OHSA (15%)
- KM-06-KT10: Distribution centres (DC) (5%)
- KM-06-KT11: Supply chain, receiving and counting stock (7%)
- KM-06-KT12: Storing merchandise (7%)
- KM-06-KT13: Environmental awareness (5%)

6.2 Guidelines for Topics

6.2.1. KM-06-KT01: Product knowledge (5%)

Topic elements to be covered include:

- KT0101 Different primary categories of merchandise
- KT0102 Product characteristics and requirements
- KT0103 Basic cold chain requirements

Internal Assessment Criteria and Weight

- IAC0101 Identify and list categories of merchandise
- IAC0102 Describe merchandise in terms of characteristics and requirements

(Weight 5%)

6.2.2. KM-06-KT02: Handling and moving of merchandise (7%)

Topic elements to be covered include:

- KT0201 Functions of equipment such as trolley jacks, fork lifts, stock pullers, etc.
- KT0202 Handling of various types of merchandise such as heavy merchandise, multimedia merchandise, fragile merchandise, high risk (expensive) items to be check constantly
- KT0203 Techniques for handling different categories of merchandise
- KT0204 Understanding the importance of safety and health (ergonomics: correct stance and posture) when handling and moving merchandise.

Internal Assessment Criteria and Weight

- IAC0201 Describe the handling and moving of various types of merchandise with reference to health (ergonomics) and safety
- IAC0202 Identify types of moving equipment and explain the respective functions

(Weight 7%)

6.2.3. KM-06-KT03: Store layout (8%)

Topic elements to be covered include:

- KT0301 Basic principles of store layout
- KT0302 Planograms and wire diagrams: definition, purpose and information contained
- KT0303 Various areas such as storage area, floor, aisle and shelves lay-out, shelf facing items
- KT0304 The contribution of store layout to customer service
- KT0305 Requirements for signage such as visibility, placement, safety, etc.

Internal Assessment Criteria and Weight

- IAC0301 Define planograms/wire diagrams and the explain functions
- IAC0302 Describe store layout with reference to various areas and functions
- IAC0303 Evaluate signages as per organisation standard
- IAC0304 Identify types of shelving

(Weight 8%)

6.2.4. KM-06-KT04: Housekeeping (7%)

Topic elements to be covered include:

- KT0401 Housekeeping standards for maintaining merchandise displays
- KT0402 Floor walks, clutter free aisles, rotate, sort out damages and returns
- KT0403 Maintaining housekeeping requirements

- KT0404 Wash shelves and clean area

Internal Assessment Criteria and Weight

- IAC0401 Justify the importance of compliance with housekeeping standards
- IAC0402 List ways and means to maintain housekeeping standards with reference to at least all labels face to front, clean spillages, general appearance of aisle maintained, etc.

(Weight 7%)

6.2.5. KM-06-KT05: Merchandising (10%)

Topic elements to be covered include:

- KT0501 Merchandising skills and principles
- KT0502 Merchandising requirements such as labels facing customer, quick selling pack at eye level or when receiving, packing, marking and selling merchandise)
- KT0503 Process to merchandise and maintain floor
- KT0504 Process to merchandise and maintain shelves
- KT0505 Process to mark merchandise
- KT0506 Use of correct merchandise labels
- KT0507 Use of correct signage in store
- KT0508 Techniques for preventing losses whilst price marking and displaying merchandise

Internal Assessment Criteria and Weight

- IAC0501 Explain principles applicable to merchandising
- IAC0502 Identify and describe specific processes to maintain shelves, racks, aisles, floor with reference to unpacking shelves, wiping shelves clean, rotate stock, add new merchandise, shelf-edge ticketing, promotional signage, and the like
- IAC0503 Describe methods for marking and labelling of merchandise
- IAC0504 Explain the placement of labels and signage in the store
- IAC0505 Discuss the use of information on labels for managing merchandise

(Weight 10%)

6.2.6. KM-06-KT06: Displays (8%)

Topic elements to be covered include:

- KT0601 Types and functions of displays
- KT0602 Display instructions: Verbal instruction or planogram procedures
- KT0603 Signage and promotional signage

- KT0604 Techniques for erecting signage for merchandise display
- KT0605 Maintain point of sale displays

Internal Assessment Criteria and Weight

- IAC0601 Evaluate the function of displays in selling of merchandise
- IAC0602 Assess requirements for effective displays
- IAC0603 Explain techniques for erecting and maintaining displays

(Weight 8%)

6.2.7. KM-06-KT07: Replenishment and maintenance of displays (8%)

Topic elements to be covered include:

- KT0701 Calculation of quantities required to replenish the display area
- KT0702 Refill and replenish
- KT0703 Maintaining displays
- KT0704 Maintaining promotional displays and merchandise
- KT0705 Managing loose stock

Internal Assessment Criteria and Weight

- IAC0701 Explain the calculation of merchandise requirements for a specific shelf area
- IAC0702 Evaluate the maintaining and replenishment of displays and promotional merchandise

(Weight 8%)

6.2.8. KM-06-KT08: Shrinkage (8%)

Topic elements to be covered include:

- KT0801 Definition and concept of shrinkage
- KT0802 The effect of shrinkage on profit and employees
- KT0803 Causes of shrinkage
- KT0804 Preventative methods for shrinkage whilst marking merchandise and maintaining merchandise and displays
- KT0805 Minimising shrinkage
- KT0806 Monitoring shrinkage

Internal Assessment Criteria and Weight

- IAC0801 Explain the concept of shrinkage and how it impacts on organisation

- IAC0802 Explain ways in which shrinkage occur in relation to the marking and maintain displays
- IAC0803 Identify techniques to monitor and minimise shrinkage

(Weight 8%)

6.2.9. KM-06-KT09: Health, safety and compliance with OHSA (15%)

Topic elements to be covered include:

- KT0901 Maintaining a safe working environment
- KT0902 Personal hygiene
- KT0903 Racking and stacking requirements and responsibilities
- KT0904 Location of safety equipment such as fire extinguishers
- KT0905 Emergency exits and procedures
- KT0906 Health and safety regulations applicable to the function of marking and displaying merchandise
- KT0907 Legal requirements and manufacturer specifications relating to equipment handling
- KT0908 Requirements for handling, storing and packing chemicals and flammables
- KT0909 Spillages
- KT0910 Employees responsibility related to safety and health

Internal Assessment Criteria and Weight

- IAC0901 Argue the concepts compliance and noncompliance
- IAC0902 Explain the regulatory requirements and manufacturer specifications for merchandising, storing and packing
- IAC0903 List safety measures applicable to the workplace and assess the implication for work activities such as racking and stacking, marking and displaying merchandise
- IAC0904 Assess responsibility for racking and stacking making sure it is done correctly and not creating risk to product or customer

(Weight 15%)

6.2.10. KM-06-KT10: Distribution centres (DC) (5%)

Topic elements to be covered include:

- KT1001 Definition of the distribution centre
- KT1002 Roles and functions in relation to stock movement
- KT1003 Safety in a distribution centre e.g. clothing and equipment

Internal Assessment Criteria and Weight

- IAC1001 Elaborate the role and function of distribution centres in supply chain
- IAC1002 List safety requirements applicable to distribution centres and discuss compliance

(Weight 5%)

6.2.11. KM-06-KT11: Supply chain, receiving and counting stock (7%)

Topic elements to be covered include:

- KT1101 Definition of the supply chain
- KT1102 Roles of the various stakeholders
- KT1103 Maintaining stock records for the supply chain
- KT1104 Receiving stock and administration
- KT1105 Stock count such as ad hoc, scheduled and planned stock take
- KT1106 Out-of-stock lists and low-stock lists

Internal Assessment Criteria and Weight

- IAC1101 Explain the impact and functioning of the supply chain on the organisation
- IAC1102 Explain stock flow through the organisation/business
- IAC1103 Describe the function of stock count to enhance the effectiveness of the supply chain
- IAC1104 Assess the importance and the effect of stock count on the business in terms of shrinkage, profits, stock levels and customer service
- IAC1105 Explain the procedures for the counting of stock as it applies to the organisation
- IAC1106 Discuss post stock count housekeeping requirements in terms of its impact on customer service

(Weight 7%)

6.2.12. KM-06-KT12: Storing merchandise (7%)

Topic elements to be covered include:

- KT1201 Purpose of storing merchandise
- KT1202 Location of identified storage areas/facilities
- KT1203 Security such as prescribed storage areas and isolated location for identified stock categories
- KT1204 Access requirements and restrictions to storage areas
- KT1205 Prescribed documentation for managing stock in storage areas

Internal Assessment Criteria and Weight

- IAC1201 Explain the function of storing merchandise
- IAC1202 State how overstocking leads to damages or shrinkage
- IAC1203 Define security aspects with reference to categories of merchandise
- IAC1204 Identify prescribed documentation for managing merchandise in storage areas

(Weight 7%)

6.2.13. KM-06-KT13: Environmental awareness (5%)

Topic elements to be covered include:

- KT1301 The business and the community
- KT1302 Impact of humans on the environment
- KT1303 Green alternatives (water harvesting and solar)
- KT1304 Recycling and its role in the business

Internal Assessment Criteria and Weight

- IAC1301 Discuss the impact of business and humans on the environment.

(Weight 5%)

6.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all topics in all the knowledge modules

Human Resource Requirements:

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

Legal Requirements:

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

6.4 Exemptions

- None

SECTION 3B: PRACTICAL SKILL MODULE SPECIFICATIONS

List of Practical Skill Module Specifications

- 522301001-PM-01, Interact with different types of customers and present a positive image, NQF Level 2, Credits 2
- 522301001-PM-02, Handle customer queries and complaints, NQF Level 2, Credits 2
- 522301001-PM-03, Provide customer service and build customer relationships, NQF Level 3, Credits 2
- 522301001-PM-04, Sell products to customers using the sales cycle, NQF Level 3, Credits 3
- 522301001-PM-05, Use advanced selling techniques, NQF Level 3, Credits 2
- 522301001-PM-06, Coordinate the Activities in the Perishable Goods Department Ensuring Cold Chain Compliance is Achieved and Maintained, NQF Level 3, Credits 12
- 522301001-PM-07, Handle and Move Perishable Goods and Replenish Shelves According to Cold Chain Requirements, NQF Level 2, Credits 6
- 522301001-PM-08, Merchandise Stock According to Store Planogram/Wire diagram, NQF Level 2, Credits 5

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

1.1 Purpose of the Practical Skill Modules

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

The learner will be required to:

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

1.2 Guidelines for Practical Skills

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

Scope of Practical Skill

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

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

Applied Knowledge

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

Internal Assessment Criteria

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

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

Scope of Practical Skill

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

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

Applied Knowledge

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

Internal Assessment Criteria

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

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

Scope of Practical Skill

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

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

Applied Knowledge

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

- AK0305 Methods for analysing photographs

Internal Assessment Criteria

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

1.3 Provider Programme Accreditation Criteria

Physical Requirements:

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

Human Resource Requirements:

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

Legal Requirements:

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

1.4 Exemptions

- None

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

2.1 Purpose of the Practical Skill Modules

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

The learner will be required to:

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

2.2 Guidelines for Practical Skills

2.2.1. PM-02-PS01: Handle customer queries

Scope of Practical Skill

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

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

Applied Knowledge

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

Internal Assessment Criteria

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

2.2.2. PM-02-PS02: Handle customer complaints

Scope of Practical Skill

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

- PA0201 Respond to customer complaints

- PA0202 Handle upset customers
- PA0203 Escalate the complaint

Applied Knowledge

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

Internal Assessment Criteria

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

2.3 Provider Programme Accreditation Criteria

Physical Requirements:

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

Human Resource Requirements:

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

Legal Requirements:

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

2.4 Exemptions

- None

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

3.1 Purpose of the Practical Skill Modules

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

The learner will be required to:

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

3.2 Guidelines for Practical Skills

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

Scope of Practical Skill

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

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

Applied Knowledge

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

Internal Assessment Criteria

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

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

Scope of Practical Skill

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

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

Applied Knowledge

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

Internal Assessment Criteria

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

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

Scope of Practical Skill

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

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

Applied Knowledge

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

Internal Assessment Criteria

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

3.2.4. PM-03-PS04: Enhance customer relationships

Scope of Practical Skill

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

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

Applied Knowledge

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

Internal Assessment Criteria

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

3.3 Provider Programme Accreditation Criteria

Physical Requirements:

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

Human Resource Requirements:

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

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

Legal Requirements:

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

3.4 Exemptions

- None

DRAFT

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

4.1 Purpose of the Practical Skill Modules

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

The learner will be required to:

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

4.2 Guidelines for Practical Skills

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

Scope of Practical Skill

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

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

Applied Knowledge

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

- AK0110 Methods for identifying customers positive buying signals

Internal Assessment Criteria

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

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

Scope of Practical Skill

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

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

Applied Knowledge

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

Internal Assessment Criteria

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

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

4.3 Provider Programme Accreditation Criteria

Physical Requirements:

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

Human Resource Requirements:

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

Legal Requirements:

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

4.4 Exemptions

- None

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

5.1 Purpose of the Practical Skill Modules

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

The learner will be required to:

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

5.2 Guidelines for Practical Skills

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

Scope of Practical Skill

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

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

Applied Knowledge

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

Internal Assessment Criteria

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

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

Scope of Practical Skill

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

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

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

Applied Knowledge

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

Internal Assessment Criteria

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

5.3 Provider Programme Accreditation Criteria

Physical Requirements:

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

Human Resource Requirements:

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

Legal Requirements:

- A legal business entity.

- Meet health and safety standards

5.4 Exemptions

- None

DRAFT

6. 522301001-PM-06, Coordinate the Activities in the Perishable Goods Department Ensuring Cold Chain Compliance is Achieved and Maintained, NQF Level 3, Credits 12

6.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to acquire the necessary skills to coordinate staff and the supply of perishable goods, whilst controlling and maintaining compliance

The learner will be required to:

- PM-06-PS01: Coordinate perishable goods replenishers by conducting planning, goal setting and scheduling
- PM-06-PS02: Monitor and coordinate the operational activities in the perishable goods department
- PM-06-PS03: Display coordination skills in dealing with incidents or accidents
- PM-06-PS04: Apply business continuity plan in cases of emergency such as fire, robbery, flooding, bomb threat, power failure
- PM-06-PS05: Prepare for an audit or inspection
- PM-06-PS06: Plan and implement a special event to promote sales in accordance with the theme

6.2 Guidelines for Practical Skills

6.2.1. PM-06-PS01: Coordinate perishable goods replenishers by conducting planning, goal setting and scheduling

Scope of Practical Skill

Given a case study with information on the perishable goods section of the store (number of staff, skills, stock, equipment availability) the learner must be able to:

- PA0101 Work out weekly schedules and rosters
- PA0102 Delegate tasks according to availability of staff, skills and schedule
- PA0103 Solve problems related to planning, scheduling and achieving goals
- PA0104 Monitor and control staff activities including time keeping, leave and absenteeism
- PA0105 Record and report staff performance such as late-coming, intoxication, absenteeism and leave and take action according to organisational procedures
- PA0106 Compile documentation for and conduct a team meeting to set goals and objectives for the day
- PA0107 Oversee shift rotation
- PA0108 Conduct hand over processes between shifts/breaks and complete shop hand-over document

Applied Knowledge

- AK0101 Techniques for planning, goal setting and scheduling
- AK0102 Techniques for monitoring and controlling staff activities
- AK0103 Coordinating techniques

- AK0104 Floor/aisle walks

Internal Assessment Criteria

- IAC0101 Apply basic planning, goal setting and scheduling principles and related activities and observe the success and effectiveness of the day-to-day running of the shop floor/aisle/section
- IAC0102 Identify problems which occurs during a supervision shift, analyse causes and suggest rectification actions
- IAC0103 Identify opportunities to improve coordination

6.2.2. PM-06-PS02: Monitor and coordinate the operational activities in the perishable goods department

Scope of Practical Skill

Given a case study with information on the perishable goods section of the store (such as number of staff, skills, stock, equipment availability, targets, requirements, stock reports, planogram/wirediagram) the learner must be able to:

- PA0201 Monitor shop keeping discipline (personal hygiene, food safety, store presentation, shelf labels, etc.) according to information on stock reports and planogram/wirediagram
- PA0202 Monitor and oversee deep cleaning of freezers and chillers
- PA0203 Promote sales (availability of stock, replenishment of chillers, freezers and shelves and cross-merchandising)
- PA0204 Provide input into the planogram to promote sales of products in department
- PA0205 Conduct monitoring at suitable intervals to maintain cold chain requirements
- PA0206 Reduce wastage (stock rotation, temperatures, handling of produce)
- PA0207 Prevent and control shrinkage by monitoring stock movement from receiving to front-end
- PA0208 Monitor minimum stock levels and fill out requisitions

Applied Knowledge

- AK0201 Techniques for planning, goal setting and scheduling
- AK0202 Techniques for monitoring and controlling perishable goods
- AK0203 Coordinating techniques
- AK0204 Cold chain requirements and compliance

Internal Assessment Criteria

- IAC0201 Monitor and maintain basic monitoring principles, apply related activities and monitor and maintain the success and effectiveness of the day-to-day running of the perishable goods section
- IAC0202 Monitor the perishable goods section ensuring compliance with cold chain, safety and quality requirements
- IAC0203 Monitor stock movement to prevent and control shrinkage and wastage

- IAC0204 Identify opportunities to improve the effectiveness of the perishable goods section

6.2.3. PM-06-PS03: Display coordination skills in dealing with incidents or accidents

Scope of Practical Skill

Given case studies or scenarios of a range of typical incidents and accidents the learner must be able to:

- PA0301 Observe and evaluate the nature of the incident or accident
- PA0302 Identify the possible causes of the incident
- PA0303 Identify and list possible courses of action to be taken
- PA0304 Decide on the best course of action by evaluating advantages and disadvantages of each action
- PA0305 Record and report on the incident and actions taken
- PA0306 Identify preventative measures related to the incident

Applied Knowledge

- AK0301 Coordination techniques

Internal Assessment Criteria

- IAC0301 List incidents or accidents which might occur during a shift and analyse causes, rectification actions and preventative measures

6.2.4. PM-06-PS04: Apply business continuity plan in cases of emergency such as fire, robbery, flooding, bomb threat, power failure

Scope of Practical Skill

Given case studies, role plays or scenarios of emergencies such as fire, robbery, flooding, etc. the learner must be able to:

- PA0401 Observe and evaluate the nature of the emergency
- PA0402 Communicate to relevant officials or institutions
- PA0403 Convey message to nearby customers in a manner which will prevent panic
- PA0404 Identify the possible causes of the emergency
- PA0405 Identify the applicable procedure
- PA0406 Implement action according the required emergency procedure
- PA0407 Provide assistance as being tasked

Applied Knowledge

- AK0401 Techniques for dealing with emergencies
- AK0402 Procedures for dealing with emergencies

Internal Assessment Criteria

- IAC0401 Analyse the requirements of a business continuity plan in case of emergency and identify actions

6.2.5. PM-06-PS05: Prepare for an audit or inspection

Scope of Practical Skill

Given case studies, role plays or scenarios on an audit and inspection and access to workplace information, records, requirements, procedures and checklists with shortfalls and deviation from requirements the learner must be able to:

- PA0501 Conduct a structured or formal floor/aisle walk and observe that store criteria are complied with
- PA0502 Use checklist to record findings and address deviations from required standards
- PA0503 Report and/or escalate findings
- PA0504 Compile and submit scheduled reports
- PA0505 Conduct checking and inspecting of processes in accordance with standard operating procedures
- PA0506 Prepare all relevant documentation for internal and external audits
- PA0507 Investigate and rectify all shortcomings identified by auditors and provide evidence

Applied Knowledge

- AK0501 Techniques for inspecting and observing compliance
- AK0502 Floor/aisle walks
- AK0503 Use of checklists
- AK0504 Standard operating procedures and policies

Internal Assessment Criteria

- IAC0501 Conduct a floor/aisle walk in a structured manner and identify and observe deviations from requirements
- IAC0502 Complete a checklist indicating compliance and non-compliance
- IAC0503 Check relevant documentation for completeness and accuracy
- IAC0504 Analyse deviations indicated by auditor to identify causes
- IAC0505 Evaluate actions to address deviations and supply evidence of successful implementation

6.2.6. PM-06-PS06: Plan and implement a special event to promote sales in accordance with the theme

Scope of Practical Skill

Given a worksheet of the event and a design of the displays with information on the goods and budget (role play and scenario) the learner must be able to:

- PA0601 Attend team meetings with team and discuss an action plan
- PA0602 Identify requirements for staff increases and changes of trading hours
- PA0603 Read and interpret the design and theme of the event and display
- PA0604 Identify the products to be displayed and cross-merchandising products and increases in stock volume
- PA0605 Assign and oversee tasks for erecting display units
- PA0606 Assign and oversee tasks for building the display by taking into account visual appeal and using the identified product and cross-merchandising product identified above
- PA0607 Conduct monitoring and evaluation activities to ensure the effective implementation and of the event and maintaining quality at all times

Applied Knowledge

- AK0601 Planning, coordinating and monitoring techniques

Internal Assessment Criteria

- IAC0601 Identify all aspects of the event and consider implications for staff requirements and increase in stock volumes during the planning of the event
- IAC0602 Schedule the implementation of the event providing monitoring at regular intervals to ensure deadlines are met
- IAC0603 Clearly identify timelines with deliverables and identify monitoring intervals

6.3 Provider Programme Accreditation Criteria

Physical Requirements:

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

Human Resource Requirements:

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

- Assessors must have relevant industry experience related to the subject

Legal Requirements:

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

6.4 Exemptions

- None

DRAFT

7. 522301001-PM-07, Handle and Move Perishable Goods and Replenish Shelves According to Cold Chain Requirements, NQF Level 2, Credits 6

7.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to acquire the necessary skills to handle and move perishable goods according to produce requirements and maintain cold chain standards whereby minimising stock shrinkage

The learner will be required to:

- PM-07-PS01: Use, clean and store equipment used in the perishable goods department
- PM-07-PS02: Maintain a safe and compliant working area
- PM-07-PS03: Identify food types, perishable goods and information from labels such as price, sell-by dates, use-by dates
- PM-07-PS04: Move perishable goods from receiving/storage to sales area
- PM-07-PS05: Monitor and maintain required temperature in chillers and freezers
- PM-07-PS06: Prevent contamination of perishable goods and apply disposal procedure for contaminated or damaged food products
- PM-07-PS07: Handle, repackage and label perishable goods
- PM-07-PS08: Replenish perishable goods to maintain stock levels in freezers and chillers
- PM-07-PS09: Perform deep cleaning of cold chain display units and back areas
- PM-07-PS10: Count stock for stock taking purposes
- PM-07-PS11: Respond to basic customer queries and escalate queries

7.2 Guidelines for Practical Skills

7.2.1. PM-07-PS01: Use, clean and store equipment used in the perishable goods department

Scope of Practical Skill

Given a scale, products/produce, bags, scale labels, temperature probes, dollies, lugs, pallets and pallet jack, cages, cleaning chemicals, cloths, brooms, mops, buckets, personal protective clothing (PPC), stationary, scanners, tablets (if used) the learner must be able to:

- PA0101 Use weighing equipment and weigh perishable goods
- PA0102 Use equipment for moving perishable goods applying the required time factor
- PA0103 Measure core temperature and take readings using appropriate measuring equipment and record readings
- PA0104 Use cleaning equipment and chemicals
- PA0105 Clean spillages using correct disposal measures

Applied Knowledge

- AK0101 Types of equipment

- AK0102 Cleaning procedures and chemicals used
- AK0103 Equipment usage requirements

Internal Assessment Criteria

- IAC0101 Identify and use typical equipment used in the perishable goods department complying with manufacturer specifications and safety measures
- IAC0102 Clean and store typical equipment used in the perishable goods department
- IAC0103 Clean spillages in compliance with regulations

7.2.2. PM-07-PS02: Maintain a safe and compliant working area

Scope of Practical Skill

Given a DVD of non-compliant work area and pictures of appropriate dress, hazardous objects, safety and emergency signs, policy and procedure documents the learner must be able to:

- PA0201 Identify and apply appropriate PPC appropriate to the working situation/condition.
- PA0202 Apply personal hygiene procedures to maintain hygiene standards at all times.
- PA0203 Identify hazardous objects/products or potential hazards.
- PA0204 Identify and apply safety and emergency signs.
- PA0205 Identify and apply safety equipment appropriate to the situation.

Applied Knowledge

- AK0201 Health and safety requirements and procedures
- AK0202 Hazards and risks in the workplace
- AK0203 Types of safety signs and meanings
- AK0204 Safety drills (i.e. evacuation)

Internal Assessment Criteria

- IAC0201 Identify and appropriately wear PPC in compliance with safety regulations
- IAC0202 Maintain personal and work area hygiene compliance
- IAC0203 Maintain the working area as free from clutter and objects which can pose a risk to customers and fellow workers
- IAC0204 Identify safety signs and describe respective purposes

7.2.3. PM-07-PS03: Identify food types, perishable goods and information from labels such as price, sell-by dates, use-by dates

Scope of Practical Skill

Given a range of different food products (which could be pictures) and examples of shelf edge labels, scanners, price report the learner must be able to:

- PA0301 Visually identify food types and perishable goods
- PA0302 Identify and apply shelf-edge labels
- PA0303 Identify stock keeping unit (SKU) number
- PA0304 Read and interpret information on labels
- PA0305 Identify and apply the correct pricing of perishable goods

Applied Knowledge

- AK0301 Reading and writing skills
- AK0302 How to use scanners and other electronic equipment used to label perishable goods

Internal Assessment Criteria

- IAC0301 Interpret perishable goods labels and tickets and apply information gleaned from the labels in the merchandising and handling of perishable goods
- IAC0302 Verify pricing of goods as correct

7.2.4. PM-07-PS04: Move perishable goods from receiving/storage to sales area

Scope of Practical Skill

Given DVDs/pictures, dollies, pallets, pallet jack, cages, totes and products the learner must be able to:

- PA0401 Lift heavy objects taking the correct physical position and apply safe ergonomic stance
- PA0402 Using right equipment for designed purpose
- PA0403 Stack cages not exceeding height limit
- PA0404 Move dollies and jacks using correct method
- PA0405 Keep to the time limit for perishable goods maintaining the temperature
- PA0406 Maintain the cold chain requirements when moving and packing goods

Applied Knowledge

- AK0401 Equipment used to move goods
- AK0402 Safety related to moving goods
- AK0403 Basic ergonomic principles
- AK0404 Packing and stacking requirements of perishable goods
- AK0405 Cold chain requirements for perishable goods

Internal Assessment Criteria

- IAC0401 Move perishable goods using appropriate equipment for the task

- IAC0402 Adhere to staking limits
- IAC0403 Maintain cold chain requirements when moving perishable goods whereby preventing damage and loss
- IAC0404 Handle, lift and move objects according to safety requirements

7.2.5. PM-07-PS05: Monitor and maintain required temperature in chillers and freezers

Scope of Practical Skill

Given a log sheet, different cooler units (freezer, chillers, ambient areas) with gauges/temperature probe, ambient and frozen product types (which could be pictures) the learner must be able to:

- PA0501 Identify appropriate chillers and freezers according to perishable food types
- PA0502 Differentiate between ambient and frozen product temperature ranges
- PA0503 Identify legally required temperature ranges of chillers and freezers according to perishable food types
- PA0504 Take temperature readings to monitor legal compliance throughout the day
- PA0505 Respond to fridge alarms according to workplace procedures by notifying the controller

Applied Knowledge

- AK0501 Reading and writing skills
- AK0502 How to use (cold chain) measuring equipment

Internal Assessment Criteria

- IAC0501 Take temperature readings using the appropriate devices or equipment
- IAC0502 Maintain legal compliance throughout the shift by regular monitoring according to perishable food types and responding to alarms

7.2.6. PM-07-PS06: Prevent contamination of perishable goods and apply disposal procedure for contaminated or damaged food products

Scope of Practical Skill

Given DVD and pictures of contaminated food products and pests, policy and procedure document the learner must be able to:

- PA0601 Identify pests and other contaminants
- PA0602 Segregate contaminated goods
- PA0603 Identify and dispose of food products that have reached expiry dates, damaged packages, fridge break down and cold chain not maintained, notification from head office, product defects, quality, excess, contaminated products, separation of various products
- PA0604 Apply legal requirements for the disposal of food

Applied Knowledge

- AK0601 Reading and writing skills
- AK0602 Cold chain requirements
- AK0603 Legal requirements related to perishable goods

Internal Assessment Criteria

- IAC0601 Timeously identify and segregate contaminated or damaged goods to prevent spreading of contamination
- IAC0602 Dispose of contaminated or damaged/spoiled food products in compliance with legal requirements

7.2.7. PM-07-PS07: Handle, repackage and label perishable goods

Scope of Practical Skill

Given packaging, wrapping machines, bags, ties, product labels, vita film, scale, DVDs (could include visit to suppliers) and products the learner must be able to:

- PA0701 Handle sensitive products safely and hygienically without causing bruises or other damage
- PA0702 Select and weigh perishable products
- PA0703 Verify price accuracy
- PA0704 Package weighed products using packaging material or wrapping materials and machines
- PA0705 Attach price and product description labels to the product where applicable

Applied Knowledge

- AK0701 Equipment used to move goods
- AK0702 Safety related to moving goods
- AK0703 Basic ergonomic principles
- AK0704 Packing and stacking requirements of perishable goods
- AK0705 Cold chain requirements for perishable goods

Internal Assessment Criteria

- IAC0701 Handle and package perishable goods, which may be sensitive without causing bruising or other damage
- IAC0702 Use weighing equipment used and read weights
- IAC0703 Attach price and product description labels showing correct information in compliance with legislation

7.2.8. PM-07-PS08: Replenish perishable goods to maintain stock levels in freezers and chillers

Scope of Practical Skill

Given a wire diagram/planogram, stock report access to freezers, chillers and ambient stock room, price marking guns and labels the learner must be able to:

- PA0801 Do a physical check on display freezers and chillers to identify over-stock and stock shortages reading the shelf edge label
- PA0802 Pick the stock from the chillers/freezers in the store area
- PA0803 Replenish stock and apply pricing labels where applicable
- PA0804 Apply the substitution rule to fill gaps according to business policy
- PA0805 Ensure the planogram/wire diagram is applied
- PA0806 Ensure the shelf-edge price correspond with unit price

Applied Knowledge

- AK0801 Reading and writing skills
- AK0802 Planogram/wire diagrams
- AK0803 Cold chain requirements
- AK0804 Legal requirements related to perishable goods
- AK0805 Packing and stacking requirements of perishable goods types

Internal Assessment Criteria

- IAC0801 Use a stock report and planogram/wire diagram to make decisions on over- or stock shortages
- IAC0802 Use a planogram/wire diagram to replenish an empty shelf
- IAC0803 Conduct a final check to ensure shelf-edge price labels correspond with replenished stock

7.2.9. PM-07-PS09: Perform deep cleaning of cold chain display units and back areas

Scope of Practical Skill

Given access to a freezer (DVD or physical), cleaning chemicals, personal protective clothing (PPC), cleaning equipment the learner must be able to:

- PA0901 Apply relevant PPC
- PA0902 Empty the freezer or display unit
- PA0903 Strip the freezer or display unit of all loose parts
- PA0904 Clean the freezer, display unit and all loose parts using suitable chemicals
- PA0905 Reassemble the freezer or display unit
- PA0906 Maintain cold chain of items removed from the freezer or display case during the cleaning process

- PA0907 Repack the freezer or display case according to the planogram/wire diagram

Applied Knowledge

- AK0901 Types of cleaning equipment and cold chain display units
- AK0902 Cleaning procedures, chemicals used and safety
- AK0903 Equipment usage requirements
- AK0904 Cold chain requirements
- AK0905 Legal requirements related to perishable goods
- AK0906 Packing and stacking requirements of perishable goods types

Internal Assessment Criteria

- IAC0901 Strip a display unit, clean and reassemble components compliance with safety and hygiene requirements
- IAC0902 Use the correct deep cleaning process and chemicals
- IAC0903 Apply cold chain requirements during the cleaning procedure
- IAC0904 Remove, store and repack content of the display unit after the cleaning procedure and meet requirements of the planogram/wire diagram

7.2.10. PM-07-PS10: Count stock for stock taking purposes

Scope of Practical Skill

Given stationary, scanner, calculator the learner must be able to:

- PA1001 Perform a physical count of product ensuring accuracy as not to inflate or deflate stock
- PA1002 Differentiate where to count per unit or mass
- PA1003 Count bulk product (cases) vs single units ensuring using correct recording
- PA1004 Scan and count vs scan each item where you have multiple products on the same shelf (with different bar codes)

Applied Knowledge

- AK1001 Reading, writing and numeracy skills
- AK1002 Stock counting procedures and methods
- AK1003 Stock counting equipment (i.e. scanners)

Internal Assessment Criteria

- IAC1001 Apply the appropriate procedure and use appropriate equipment during stock count procedures
- IAC1002 Record stock count information accurately and diligently

7.2.11. PM-07-PS11: Respond to basic customer queries and escalate queries

Scope of Practical Skill

Given a scenario (simulation) or DVDs, role play, copy of the policy and procedure document the learner must be able to:

- PA1101 Demonstrate correct behaviour in handling a customer query
- PA1102 Decide when to escalate the query

Applied Knowledge

- AK1101 Communication skills
- AK1102 CPA
- AK1103 Policies related to customer care

Internal Assessment Criteria

- IAC1101 Handle a customer query by taking appropriate action
- IAC1102 Interaction with the customer complies with company policy

7.3 Provider Programme Accreditation Criteria

Physical Requirements:

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

Human Resource Requirements:

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

Legal Requirements:

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

7.4 Exemptions

- None

DRAFT

8. 522301001-PM-08, Merchandise Stock According to Store Planogram/Wire diagram, NQF Level 2, Credits 5

8.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to apply merchandising principles and conduct merchandising activities to maintain display areas in compliance with safety standards

The learner will be required to:

- PM-08-PS01: Read and interpret a wire diagram / planogram and work instruction
- PM-08-PS02: Identify types of merchandise and information from labels such as price, sell-by dates, use-by dates
- PM-08-PS03: Move merchandise from receiving/storage to sales area
- PM-08-PS04: Mark merchandise on promotion/sale with labels, tickets and signage
- PM-08-PS05: Merchandise stock for display (everyday merchandising)
- PM-08-PS06: Create displays for a special event by merchandising merchandise
- PM-08-PS07: Comply with safety and housekeeping whilst marking and displaying merchandise
- PM-08-PS08: Prevent shrinkage whilst marking and displaying merchandise.
- PM-08-PS09: Prepare for and count stock

8.2 Guidelines for Practical Skills

8.2.1. PM-08-PS01: Read and interpret a wire diagram / planogram and work instruction

Scope of Practical Skill

Given a wire diagram/planogram, work instruction and access to a store (which could be simulated) the learner must be able to:

- PA0101 Identify the layout of the store according to the information on the wire diagram /planogram
- PA0102 Identify various sections of the store according to the information on the wire diagram /planogram
- PA0103 Identify floor, aisle and shelves lay-out, display areas, promotional area, shelf facing items from the wire diagram /planogram

Applied Knowledge

- AK0101 Reading and writing skills
- AK0102 Different sections and areas in a wholesale and retail store

Internal Assessment Criteria

- IAC0101 Interpret wire diagrams / planograms
- IAC0102 Identify various areas in the store as indicated on the wire diagram / planogram

8.2.2. PM-08-PS02: Identify types of merchandise and information from labels such as price, sell-by dates, use-by dates

Scope of Practical Skill

Given a range of different products (which could be pictures) and examples of shelf edge labels, scanners and price reports the learner must be able to:

- PA0201 Visually identify food types, perishable merchandise, heavy merchandise, multimedia merchandise, fragile merchandise, high risk merchandise, etc.
- PA0202 Identify and apply shelf edge labels
- PA0203 Identify stock keeping unit (SKU) number
- PA0204 Read and interpret information on labels
- PA0205 Verify the correct pricing of merchandise from the stock report or scanner

Applied Knowledge

- AK0201 Reading and writing skills
- AK0202 Types of labels
- AK0203 Information printed on labels

Internal Assessment Criteria

- IAC0201 Interpret and use information from labels such as price, sell-by dates, use-by dates are to identify and manage various types of merchandise

8.2.3. PM-08-PS03: Move merchandise from receiving/storage to sales area

Scope of Practical Skill

Given DVDs/pictures, dollies, pallets, pallet jack, cages, totes and products the learner must be able to:

- PA0301 Lift heavy objects taking the correct physical position and apply safe ergonomic stance
- PA0302 Using right equipment for designed purpose
- PA0303 Stack cages not exceeding height limit
- PA0304 Move dollies and jacks using correct method
- PA0305 Apply correct handling procedures for various categories of merchandise such as heavy merchandise, multimedia merchandise, fragile merchandise and high risk merchandise

Applied Knowledge

- AK0301 Equipment used to move merchandise
- AK0302 Safety related to moving merchandise
- AK0303 Basic ergonomic principles
- AK0304 Packing and stacking requirements

- AK0305 Cold chain requirements for perishable merchandise

Internal Assessment Criteria

- IAC0301 Apply correct handling procedures for various categories of merchandise such as heavy merchandise, multimedia merchandise, fragile merchandise and high risk merchandise as applicable
- IAC0302 Identify different areas in the store move and various types/categories of merchandise to the designated area by using the appropriate equipment
- IAC0303 Apply safe ergonomic stance and physical positions when handling or moving merchandise

8.2.4. PM-08-PS04: Mark merchandise on promotion/sale with labels, tickets and signage

Scope of Practical Skill

Given merchandise, labels, tickets, signage and relevant equipment the learner must be able to:

- PA0401 Obtain promotional labels and verify information with information on item
- PA0402 Attach promotional labels or tickets to merchandise and signage to the shelf, rail, aisle or floor
- PA0403 Identify soiled, damaged, illegible or incorrect labels/tickets

Applied Knowledge

- AK0401 Equipment used to move label merchandise
- AK0402 Requirements for labels or tickets

Internal Assessment Criteria

- IAC0401 Use price labels and tickets as instructed and according to merchandise characteristics
- IAC0402 Use promotional signage according to promotional brief
- IAC0403 Identify soiled, damaged, illegible or incorrect labels/tickets and take corrective actions
- IAC0404 Check and action pricing according to organisational policy

8.2.5. PM-08-PS05: Merchandise stock for display (everyday merchandising)

Scope of Practical Skill

Given a scenario and merchandising instructions, merchandise and display area (which could be simulated) the learner must be able to:

- PA0501 Interpret merchandising instructions
- PA0502 Prepare the merchandising area (shelf/rail/floor) in compliance with safety and housekeeping requirements
- PA0503 Collect merchandise from the stock room and verify it is correct
- PA0504 Prepare for everyday merchandising

- PA0505 Check quantity, price and quality of merchandise
- PA0506 Replenish shelves/rails/floor
- PA0507 Verify information on shelf-edge labels is accurate according to merchandise information
- PA0508 Identify merchandise shortages

Applied Knowledge

- AK0501 Reading and writing skills
- AK0502 Planograms/wire diagrams
- AK0503 Legal requirements related to perishable merchandise
- AK0504 Packing and stacking requirements

Internal Assessment Criteria

- IAC0501 Interpret merchandising instructions
- IAC0502 Unpack merchandise according to the instructions
- IAC0503 Display merchandise using the appropriate display fixtures and fittings
- IAC0504 Apply merchandise handling techniques based on merchandise characteristics and instruction

8.2.6. PM-08-PS06: Create displays for a special event by merchandising merchandise

Scope of Practical Skill

Given allocated display area (which could be within the store or simulated), instruction, a range of relevant and irrelevant stock the learner must be able to:

- PA0601 Identify the display area using a planogram/ wire diagram
- PA0602 Prepare the display area according to instruction and housekeeping standards
- PA0603 Select merchandise according to the instruction
- PA0604 Prepare merchandise applying safety and housekeeping requirements
- PA0605 Prepare the display equipment
- PA0606 Merchandise the display
- PA0607 Escalate possible stock shortages in order to enhance efficiency of the supply chain
- PA0608 Monitor the frequency of sales of display items

Applied Knowledge

- AK0601 Reading and writing skills
- AK0602 Planogram/wire diagrams
- AK0603 Legal requirements

- AK0604 Packing and stacking requirements

Internal Assessment Criteria

- IAC0601 Create displays according to instruction and merchandise characteristics including replenish
- IAC0602 Adhere to housekeeping standards for displays
- IAC0603 Change merchandise displays and layout as instructed
- IAC0604 Identify incorrect displays and layouts and take corrective action
- IAC0605 Evaluate the effectiveness of the display and give feedback

8.2.7. PM-08-PS07: Comply with safety and housekeeping whilst marking and displaying merchandise

Scope of Practical Skill

Given allocated display/aisle in the store or simulated the learner must be able to:

- PA0701 Conduct a floor walk to check that the display area complies with housekeeping and safety requirements
- PA0702 Observe deviations from housekeeping and safety requirements
- PA0703 Take corrective action to address all deviations

Applied Knowledge

- AK0701 Health and safety requirements and procedures
- AK0702 Hazards and risks in the workplace
- AK0703 Types of safety signs and meanings
- AK0704 Safety drills (i.e. evacuation)

Internal Assessment Criteria

- IAC0701 Maintain display areas and merchandise as per housekeeping standards
- IAC0702 Keep display area safe for customers according to safety requirements of the organisation
- IAC0703 Adhere to safety requirements when moving merchandise through the store
- IAC0704 Handle display and marking equipment in a manner that minimises damage and maintains safety of staff and customers when merchandising

8.2.8. PM-08-PS08: Prevent shrinkage whilst marking and displaying merchandise.

Scope of Practical Skill

Given a DVD showing risks related to various kinds of shrinkage and access to an allocated display area (which could be within the store or simulated) the learner must be able to:

- PA0801 Ensure correct merchandise is received according to relevant documentation
- PA0802 Identify and monitor stock levels of high risk items
- PA0803 Identify unsaleable merchandise and remove off the floor
- PA0804 Rotate merchandise to minimise stock losses
- PA0805 Identify and escalate stock loss trends
- PA0806 Prevent merchandise from being damaged or soiled by correct handling techniques

Applied Knowledge

Internal Assessment Criteria

- IAC0801 Implement shrinkage prevention measures according to organisational requirements
- IAC0802 Rotate merchandise and remove unsaleable merchandise from display according to merchandise requirements and health and safety procedures
- IAC0803 Handle merchandise in such a manner that minimises losses

8.2.9. PM-08-PS09: Prepare for and count stock

Scope of Practical Skill

Given stock counting forms, stationary, scanners and shelves with stock the learner must be able to:

- PA0901 Prepare for stock count
- PA0902 Apply manual and electronic count procedures
- PA0903 Identify stock errors
- PA0904 Record the results of stock count on the required documents
- PA0905 Perform post stock count housekeeping functions

Applied Knowledge

- AK0901 Reading, writing and numeracy skills
- AK0902 Stock counting procedures and methods
- AK0903 Stock counting equipment (i.e. scanners)

Internal Assessment Criteria

- IAC0901 Interpret instructions for stock counts according to organisational procedures
- IAC0902 Prepare identified stock for counting according to organisational requirements and safety procedures
- IAC0903 Check and sort stock for stock counts according to organisational counting requirements
- IAC0904 Count and record stock is following organisational procedures
- IAC0905 Explain procedures for correcting errors according to organisational requirements

- IAC0906 Remove evidence of stock counts to meet the organisational housekeeping standards
- IAC0907 Check stock displays are checked if they meet pre-stock count merchandising standards.

8.3 Provider Programme Accreditation Criteria

Physical Requirements:

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

Human Resource Requirements:

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

Legal Requirements:

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

8.4 Exemptions

- None

SECTION 3C: WORK EXPERIENCE MODULE SPECIFICATIONS

List of Work Experience Module Specifications

- 522301001-WM-01, Processes and procedures for attending to different types of customers, handling customer queries and communicating with customers, NQF Level 2, Credits 10
- 522301001-WM-02, Processes and procedures for providing customer service, NQF Level 3, Credits 8
- 522301001-WM-03, Processes and procedures for selling products to customers using the sales cycle and advanced selling techniques in a full service wholesale or retail sales environment, NQF Level 03, Credits 14
- 522301001-WM-04, Cold Chain Control and Perishable Goods Monitoring, NQF Level 3, Credits 12
- 522301001-WM-05, Perishable Goods Department and Cold Chain Requirements, NQF Level 2, Credits 11
- 522301001-WM-06, In-store Merchandising Procedures, NQF Level 2, Credits 15

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

1.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to:

Gain exposure to communicating with and attending to a variety of customers and handling their queries in a retail or wholesale environment. The Learner will be required to successfully complete each Work Experience for at least 1 week under supervision before operating for 1 weeks independently. Work experience for the different modules may occur concurrently. The learning contract time which constitutes the total amount of time during which the learner needs to have access to the workplace to enable him or her to acquire the knowledge and understanding specified for this module is 12.5 days after which the assessment may take place.

The learner will be required to:

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

1.2 Guidelines for Work Experiences

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

Scope of Work Experience

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

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

Supporting Evidence

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

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

Scope of Work Experience

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

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

- WA0203 Escalate queries in line with organisational processes and procedures

Supporting Evidence

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

1.3 Contextualised Workplace Knowledge

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

1.4 Criteria for Workplace Approval

Physical Requirements:

- Operational wholesale or retail store serving a variety of customers

Human Resource Requirements:

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

Legal Requirements:

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

1.5 Additional Assignments to be Assessed Externally

All evidence produced relating to the following workplace experience must be submitted for external assessment. Attend to different types of customer, Handle a variety of customer queries in the outlet

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

2.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to:

Gain exposure to providing customer service in a wholesale or retail outlet. The learner will be required to successfully complete each Work Experience for at least 1 week under supervision before operating independently for a further 1 weeks. Work experience for the different modules may occur concurrently. The learning contract time which constitutes the total amount of time during which the learner needs to have access to the workplace to enable him or her to acquire the knowledge and understanding specified for this module is 10 days after which the assessment may take place.

The learner will be required to:

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

2.2 Guidelines for Work Experiences

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

Scope of Work Experience

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

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

Supporting Evidence

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

2.2.2. WM-02-WE02: Enhance customer relationships

Scope of Work Experience

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

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

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

Supporting Evidence

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

2.3 Contextualised Workplace Knowledge

1 Organisational policies and procedures for building customer relationships in a full or partial service sales environment

2 Organisational policies and procedures for re-serving and maintaining existing customers

3 Organisational policies and procedures for promoting customer loyalty programmes

4 Organisational policies and procedures for promoting additional customer services

5 Organisational policies and procedures for promoting a positive and professional image in the workplace

6 Organisational policies and procedures for housekeeping

2.4 Criteria for Workplace Approval

Physical Requirements:

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

Human Resource Requirements:

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

Legal Requirements:

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

2.5 Additional Assignments to be Assessed Externally

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

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

3.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to:

Gain exposure to all processes for selling products using the sales cycle including approaching customers, qualifying their needs, demonstrating products, overcoming objections, closing the sale and providing after sales service as well as demonstrating advanced selling techniques including add-on sales, supplementary services, selling up, selling alternative products and prospecting for new customers. The Learner will be required to successfully complete each Work Experience for at least 2 weeks under supervision before operating independently for a further 2 weeks. The learning contract time which constitutes the total amount of time during which the learner needs to have access to the workplace to enable him or her to acquire the knowledge and understanding specified for this module is 17.5 days after which the assessment may take place.

The learner will be required to:

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

3.2 Guidelines for Work Experiences

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

Scope of Work Experience

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

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

Supporting Evidence

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

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

Scope of Work Experience

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

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

Supporting Evidence

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

3.3 Contextualised Workplace Knowledge

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

3.4 Criteria for Workplace Approval

Physical Requirements:

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

Human Resource Requirements:

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

Legal Requirements:

- Registered as a formal business

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

3.5 Additional Assignments to be Assessed Externally

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

DRAFT

4. 522301001-WM-04, Cold Chain Control and Perishable Goods Monitoring, NQF Level 3, Credits 12

4.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to:

Gain exposure to all processes related to perishable goods and cold chain compliance and to coordinate the activities of a team of perishable goods replenishers and the flow of perishable goods in compliance with cold chain requirements

The learner will be required to:

- WM-04-WE01: Work day shift in retail or wholesale outlet
- WM-04-WE02: Work night shift in retail or wholesale outlet
- WM-04-WE03: Work weekend shift in retail or wholesale outlet
- WM-04-WE04: Conduct an internal self-audit in retail or wholesale outlet
- WM-04-WE05: Plan a special event or promotional activity to promote sales

4.2 Guidelines for Work Experiences

4.2.1. WM-04-WE01: Work day shift in retail or wholesale outlet

Scope of Work Experience

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

- WA0101 Do a floor walk with a manager and complete a hand-over document
- WA0102 Check if Customer Protection Act (CPA) production documentation is in place and valid (correct dates, signatures)
- WA0103 Schedule staff for a week and deal with absenteeism etc. according to workplace procedures or give input to the staff planner
- WA0104 Facilitate a weekly planning meeting and daily focus meeting with team for two weeks
- WA0105 Delegate daily tasks to each member of the team
- WA0106 Monitor all cold chain replenishment activities and disciplines ensuring compliance
- WA0107 Monitor compliance, safety and security of the department
- WA0108 Report on approaching a customer, offering assistance and handling a query

Supporting Evidence

- SE0101 Attendance register
- SE0102 Shift hand-over documentation
- SE0103 Floor walk checklist
- SE0104 Weekly report
- SE0105 Meeting documentation

4.2.2. WM-04-WE02: Work night shift in retail or wholesale outlet

Scope of Work Experience

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

- WA0201 Do a floor walk with a manager and complete a hand-over document
- WA0202 Check if CPA production documentation is in place and valid (correct dates, signatures)
- WA0203 Schedule staff for a night shift and deal with absenteeism etc. according to workplace procedures or give input to the staff planner
- WA0204 Facilitate a planning meeting and focus meeting with team for a night shift
- WA0205 Delegate tasks to each member of the team
- WA0206 Monitor all cold chain replenishment activities and disciplines ensuring compliance
- WA0207 Monitor compliance, safety and security of the department

Supporting Evidence

- SE0201 Attendance register
- SE0202 Shift hand-over documentation
- SE0203 Floor walk checklist
- SE0204 Night shift report
- SE0205 Meeting documentation

4.2.3. WM-04-WE03: Work weekend shift in retail or wholesale outlet

Scope of Work Experience

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

- WA0301 Do a floor walk with a manager and complete a hand-over document
- WA0302 Check if CPA production documentation is in place and valid (correct dates, signatures)
- WA0303 Schedule staff for a weekend shift and deal with absenteeism etc. according to workplace procedures or give input to the staff planner
- WA0304 Facilitate a weekend shift planning meeting and daily focus meeting with team for two weekend shifts
- WA0305 Delegate daily tasks to each member of the team
- WA0306 Monitor all cold chain replenishment activities and disciplines ensuring compliance
- WA0307 Monitor compliance, safety and security of the department
- WA0308 Report on approaching a customer, offering assistance and handling a query

Supporting Evidence

- SE0301 Attendance register
- SE0302 Shift hand-over documentation
- SE0303 Floor walk checklist
- SE0304 Weekend report
- SE0305 Meeting documentation

4.2.4. WM-04-WE04: Conduct an internal self-audit in retail or wholesale outlet

Scope of Work Experience

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

- WA0401 Conduct an internal OHSA self-audit to ensure compliance and identify and rectify deviations and conduct a follow-up with a manager to evaluate effectiveness of rectifications
- WA0402 Conduct an internal hygiene self-audit to ensure compliance and identify and rectify deviations and conduct a follow-up with a manager to evaluate effectiveness of rectifications

Supporting Evidence

- SE0401 Checklists indicating finding
- SE0402 Report indicating suggested improvements or rectifications
- SE0403 Monitoring and evaluation sheet

4.2.5. WM-04-WE05: Plan a special event or promotional activity to promote sales

Scope of Work Experience

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

- WA0501 Attend a team meeting with manager and discuss an action plan
- WA0502 Identify requirements for increasing staff volumes and changes of trading hours
- WA0503 Read and interpret the design and theme of the event and display
- WA0504 Identify the products to be displayed and cross-merchandising products and increases in stock volume
- WA0505 Conduct a team meeting with team
- WA0506 Assign and oversee tasks for building the display by taking into account visual appeal and using the identified product and cross-merchandising product identified above
- WA0507 Conduct monitoring and evaluation activities to ensure the effective implementation and of the event and maintaining quality at all times

Supporting Evidence

- SE0501 Special event or promotional activity documentation
- SE0502 Monitoring and evaluation report

4.3 Contextualised Workplace Knowledge

- 1 Organisational policies and procedures
- 2 Company standards and compliance requirements
- 3 Company floor plan and layout
- 4 Company products and produce
- 5 Company cold chain requirements and compliance standards

4.4 Criteria for Workplace Approval

Physical Requirements:

- Operational wholesale or retail store providing customer service and enhancing relationships with a variety of customers.
- Key processes: coordinating a team and perishable goods in compliance with cold chain requirements

Human Resource Requirements:

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

Legal Requirements:

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

4.5 Additional Assignments to be Assessed Externally

All evidence produced relating to the following workplace experience must be submitted for external assessment.

5. 522301001-WM-05, Perishable Goods Department and Cold Chain Requirements, NQF Level 2, Credits 11

5.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to:

Replenish perishable goods in compliance with cold chain requirements in various perishable goods sections of the store

The learner will be required to:

- WM-05-WE01: Work for half a day in each of the following departments: Meat, fish, deli, handling finished products and performing cleaning , displaying, replenishing and temperature monitoring tasks
- WM-05-WE02: Work for a full day in the fruit and veggie department, displaying, performing quality checks, culling, removing expired product, pricing and labelling, replenishing and stock rotation, weighing (where applicable)
- WM-05-WE03: Work for half a day in each of the following departments: short shelf life goods and dairy
- WM-05-WE04: Perform deep cleaning of freezers, chillers and back areas twice during the period
- WM-05-WE05: Count stock of a department/product range twice during the period
- WM-05-WE06: Maintaining a safe working environment

5.2 Guidelines for Work Experiences

5.2.1. WM-05-WE01: Work for half a day in each of the following departments: Meat, fish, deli, handling finished products and performing cleaning , displaying, replenishing and temperature monitoring tasks

Scope of Work Experience

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

- WA0101 Use, clean and store equipment used in the Meat, fish, deli, department
- WA0102 Identify food types, perishable goods and information from labels such as price, sell-by dates, use-by dates ensuring it corresponds with shelf-edge labels
- WA0103 Move goods from receiving/storage to sales area
- WA0104 Remove expired product from the chillers and freezers and move to disposal area
- WA0105 Prevent contamination of perishable goods and apply disposal procedure for contaminated or damaged food products
- WA0106 Handle, repackage and label perishable goods
- WA0107 Conduct price checks on minimum of 10 items to maintain price accuracy
- WA0108 Replenish (merchandise) perishable goods to maintain stock levels in freezers and chillers applying stock rotation and cold chain principles

- WA0109 Replenish perishable goods and maintain shelves with product according to a business packing wire diagram/planogram
- WA0110 Monitor and maintain required temperature in chillers and freezers by conducting daily temperature checks at set intervals
- WA0111 Respond to or escalate basic customer queries

Supporting Evidence

- SE0101 Attendance register
- SE0102 Production records or checklists

5.2.2. WM-05-WE02: Work for a full day in the fruit and veggie department, displaying, performing quality checks, culling, removing expired product, pricing and labelling, replenishing and stock rotation, weighing (where applicable)

Scope of Work Experience

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

- WA0201 Use, clean and store equipment used in the fruit and vegetable department
- WA0202 Identify food types, perishable goods and information from labels such as price, sell-by dates, use-by dates ensuring it corresponds with shelf-edge labels
- WA0203 Move goods from receiving/storage to sales area
- WA0204 Remove expired or spoiled product from the shelves
- WA0205 Prevent contamination of perishable goods and apply disposal procedure for contaminated or damaged food products
- WA0206 Handle, weigh, repackage and label perishable goods (where applicable)
- WA0207 Conduct price checks to maintain price accuracy
- WA0208 Replenish (merchandise) perishable goods to maintain stock levels in freezers and chillers
- WA0209 Applying stock rotation and cold chain principles to a business packing wire diagram/planogram
- WA0210 Replenish perishable goods and maintain shelves with product according
- WA0211 Monitor and maintain required temperature in chillers and freezers by conducting daily temperature checks at set intervals
- WA0212 Respond to or escalate basic customer queries

Supporting Evidence

- SE0201 Attendance register
- SE0202 Production records and checklists

5.2.3. WM-05-WE03: Work for half a day in each of the following departments: short shelf life goods and dairy

Scope of Work Experience

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

- WA0301 Use, clean and store equipment used in the short shelf live goods and dairy department
- WA0302 Identify food types, perishable goods and information from labels such as price, sell-by dates, use-by dates ensuring it corresponds with shelf-edge labels
- WA0303 Move goods from receiving/storage to sales area
- WA0304 Remove expired product from the chillers and freezers
- WA0305 Prevent contamination of perishable goods and apply disposal procedure for contaminated or damaged food products
- WA0306 Handle, repackage and label perishable goods
- WA0307 Conduct price checks on minimum of 10 items to maintain price accuracy
- WA0308 Replenish (merchandise) perishable goods to maintain stock levels in freezers and chillers applying stock rotation and cold chain principles
- WA0309 Replenish perishable goods and maintain shelves with product according to a business packing wire diagram/planogram
- WA0310 Monitor and maintain required temperature in chillers and freezers by conducting daily temperature checks at set intervals
- WA0311 Respond to or escalate basic customer queries

Supporting Evidence

- SE0301 Attendance register
- SE0302 Production records and checklists

5.2.4. WM-05-WE04: Perform deep cleaning of freezers, chillers and back areas twice during the period

Scope of Work Experience

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

- WA0401 Apply relevant personal protective clothing
- WA0402 Empty the freezer or display unit
- WA0403 Strip the freezer or display unit of all loose parts
- WA0404 Clean the freezer, display unit and all loose parts using suitable chemicals
- WA0405 Reassemble the freezer or display unit

- WA0406 Maintain cold chain of items removed from the freezer or display case during the cleaning process
- WA0407 Repack the freezer or display case according to the planogram/wire diagram

Supporting Evidence

- SE0401 Attendance register
- SE0402 Cleaning reports and checklists

5.2.5. WM-05-WE05: Count stock of a department/product range twice during the period

Scope of Work Experience

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

- WA0501 Conduct a physical count of product ensuring accuracy as not to inflate or deflate stock
- WA0502 Differentiate where to count per unit or mass
- WA0503 Count bulk product (cases) vs single units ensuring using correct recording
- WA0504 Scan and count vs scan each item where you have multiple products on the same shelf (with different bar codes)
- WA0505 Reconcile physical stock counted with stock sheet and ensure that stock reconciliation variances are accounted for

Supporting Evidence

- SE0501 Attendance register
- SE0502 Stock count records

5.2.6. WM-05-WE06: Maintaining a safe working environment

Scope of Work Experience

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

- WA0601 Conduct a floor walk to check that the display area complies with housekeeping and safety requirements
- WA0602 Observe deviations from housekeeping and safety requirements
- WA0603 Take corrective action to address all deviations
- WA0604 Apply organisation policy and procedures for disposing of spoiled or contaminated merchandise
- WA0605 Identify and dispose of chemicals meeting food safety requirements
- WA0606 Alert the supervisor/SHE representative in the event of an accident/incident to a customer or team member

Supporting Evidence

- SE0601 Attendance register
- SE0602 Safety checklists/reports

5.3 Contextualised Workplace Knowledge

- 1 Organisational policies and procedures
- 2 Company standards and compliance requirements
- 3 Company floor plan and layout
- 4 Company products and produce
- 5 Company cold chain requirements and compliance standards

5.4 Criteria for Workplace Approval

Physical Requirements:

- Operational wholesale or retail store providing customer service and enhancing relationships with a variety of customers.
- Key processes: coordinating a team and perishable goods in compliance with cold chain requirements

Human Resource Requirements:

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

Legal Requirements:

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

5.5 Additional Assignments to be Assessed Externally

All evidence produced relating to the following workplace experience must be submitted for external assessment.

6. 522301001-WM-06, In-store Merchandising Procedures, NQF Level 2, Credits 15

6.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to:

Merchandising of various categories/types of stock and maintain display areas. The learner is expected to rotate between stock types (minimum of four stock types)

The learner will be required to:

- WM-06-WE01: Read and interpret a wire diagram / planogram and work instruction
- WM-06-WE02: Identify types of merchandise and information from labels such as price, sell-by dates, use-by dates
- WM-06-WE03: Move merchandise from receiving/storage to sales area
- WM-06-WE04: Mark merchandise with labels, tickets and signage
- WM-06-WE05: Merchandise stock for display (everyday merchandising) and maintain displays
- WM-06-WE06: Create and maintain displays for a special event by merchandising merchandise
- WM-06-WE07: Comply with safety and housekeeping whilst marking and displaying merchandise
- WM-06-WE08: Prevent shrinkage whilst marking and displaying merchandise.
- WM-06-WE09: Prepare for and count stock

6.2 Guidelines for Work Experiences

6.2.1. WM-06-WE01: Read and interpret a wire diagram / planogram and work instruction

Scope of Work Experience

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

- WA0101 Identify the layout of the store according to the information on the wire diagram /planogram
- WA0102 Identify various sections of the store according to the information on the wire diagram /planogram
- WA0103 Identify floor, aisle and shelves lay-out, display areas, promotional area, shelf facing items from the wire diagram /planogram

Supporting Evidence

- SE0101 Attendance register
- SE0102 List of items as per wire diagram

6.2.2. WM-06-WE02: Identify types of merchandise and information from labels such as price, sell-by dates, use-by dates

Scope of Work Experience

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

- WA0201 Visually identify food types, perishable merchandise, heavy merchandise, multimedia merchandise, fragile merchandise, high risk good, etc.
- WA0202 Identify and apply shelf edge labels
- WA0203 Identify merchandise keeping unit (SKU) number
- WA0204 Read and interpret information on labels
- WA0205 Identify and apply the correct pricing of perishable merchandise

Supporting Evidence

- SE0201 Observation checklist
- SE0202 Merchandise correctly labelled
- SE0203 Merchandise categorisation

6.2.3. WM-06-WE03: Move merchandise from receiving/storage to sales area

Scope of Work Experience

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

- WA0301 Lift heavy objects taking the correct physical position and apply safe ergonomic stance
- WA0302 Using right equipment for designed purpose
- WA0303 Stack cages not exceeding height limit
- WA0304 Move dollies and jacks using correct method
- WA0305 Apply correct handling procedures for various categories of merchandise such as heavy merchandise, multimedia merchandise, fragile merchandise and high risk merchandise

Supporting Evidence

- SE0301 Supply chain documentation
- SE0302 Standard operating procedures for merchandise movement

6.2.4. WM-06-WE04: Mark merchandise with labels, tickets and signage

Scope of Work Experience

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

- WA0401 Use and apply price labels and tickets as instructed and according to merchandise characteristics
- WA0402 Use or erect promotional signage according to promotional brief
- WA0403 Identify soiled, damaged, illegible or incorrect labels/tickets and take corrective actions
- WA0404 Check and action pricing according to organisational policy

- WA0405 Action price changes according to instruction

Supporting Evidence

- SE0401 Manager/supervisor signed off on the shelf/rail/aisle

6.2.5. WM-06-WE05: Merchandise stock for display (everyday merchandising) and maintain displays

Scope of Work Experience

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

- WA0501 Interpret merchandising instructions
- WA0502 Prepare the merchandising area (shelf/rail/floor) in compliance with safety and housekeeping requirements
- WA0503 Collect merchandise from the merchandise room and verify it is correct
- WA0504 Prepare for everyday merchandising
- WA0505 Check quantity, price and quality of merchandise
- WA0506 Replenish shelves/rails/floor
- WA0507 Verify information on shelf edge labels is accurate according to merchandise information
- WA0508 Identify merchandise shortages

Supporting Evidence

- SE0501 Display signed off by manager/ supervisor

6.2.6. WM-06-WE06: Create and maintain displays for a special event by merchandising merchandise

Scope of Work Experience

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

- WA0601 Prepare the display area according to instruction and housekeeping standards
- WA0602 Prepare merchandise as operational requirements
- WA0603 Prepare the display equipment
- WA0604 Merchandise the display
- WA0605 Escalate possible merchandise shortages in order to enhance efficiency of the supply chain

Supporting Evidence

- SE0601 Display signed off by manager/ supervisor

6.2.7. WM-06-WE07: Comply with safety and housekeeping whilst marking and displaying merchandise

Scope of Work Experience

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

- WA0701 Conduct a floor walk to check that the display area complies with housekeeping and safety requirements
- WA0702 Observe deviations from housekeeping and safety requirements
- WA0703 Take corrective action to address all deviations

Supporting Evidence

- SE0701 Sign off by manager/ supervisor as per SOP

6.2.8. WM-06-WE08: Prevent shrinkage whilst marking and displaying merchandise.

Scope of Work Experience

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

- WA0801 Ensure correct merchandise is received according to relevant documentation
- WA0802 Identify and monitor merchandise levels of high risk items
- WA0803 Identify unsaleable merchandise and move off the floor
- WA0804 Rotate merchandise to minimise stock losses
- WA0805 Identify and escalate stock loss trends
- WA0806 Prevent merchandise from being damaged or soiled by using correct handling techniques

Supporting Evidence

- SE0801 Record of weekly interaction with supervisor
- SE0802 Merchandise requisition form

6.2.9. WM-06-WE09: Prepare for and count stock

Scope of Work Experience

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

- WA0901 Prepare for stock count
- WA0902 Apply manual and electronic count procedures
- WA0903 Identify stock errors
- WA0904 Record the results of stock count on the required documents
- WA0905 Perform post stock count housekeeping functions

Supporting Evidence

- SE0901 Stock counting records

6.3 Contextualised Workplace Knowledge

- 1 Organisational policies and procedures
- 2 Company standards and compliance requirements
- 3 Company floor plan and layout
- 4 Company products and produce
- 5 Company cold chain requirements and compliance standards

6.4 Criteria for Workplace Approval

Physical Requirements:

- Operational wholesale or retail store providing customer service and enhancing relationships with a variety of customers.
- Key processes: coordinating a team and perishable goods in compliance with cold chain requirements

Human Resource Requirements:

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

Legal Requirements:

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

6.5 Additional Assignments to be Assessed Externally

All evidence produced relating to the following workplace experience must be submitted for external assessment.

SECTION 4: STATEMENT OF WORK EXPERIENCE

Curriculum Number:	522301001
Curriculum Title:	Retail Sales Advisor

Learner Details	
Name:	
ID Number:	

Employer Details	
Company Name:	
Address:	
Supervisor Name:	
Work Telephone:	
E-Mail:	

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

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

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

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

	departments within an outlet		
8	Organisational customer service standards		

	Additional Assignments to be Assessed Externally	Date	Signature
--	---	------	-----------

522301001-WM-02, Processes and procedures for providing customer service, NQF Level 3, Credits 8

WM-02-WE01	Provide service to customers		
	Scope Work Experience	Date	Signature
WA0101	Promote a positive and professional image and greet customers in line with organisational standards		
WA0102	Provide customer service to a variety of customers including finding the product or offering alternative products in line with organisational standards		
	Supporting Evidence	Date	Signature
SE0101	Documentary evidence confirming that the learner has promoted a positive and professional image and has greeted customers in line with organisational standards		
SE0102	Documentary evidence confirming that the learner has provided customer service to a variety of customers in line with organisational standards including finding the right product or offering alternative products, signed off by the learner's supervisor		
SE0103	A checklist designed by the learner detailing all aspects required to promote a positive and professional image in line with organisational standards, signed off by the learner's supervisor		
WM-02-WE02	Enhance customer relationships		

	Scope Work Experience	Date	Signature
WA0201	Use organisational customer loyalty programmes or additional services to enhance customer relationships		
WA0202	Re-serving or maintaining existing customer relationships in line with organisational processes and procedures		
WA0203	Give the customer a final greeting that encourages the customer to return to the store		
	Supporting Evidence	Date	Signature
SE0201	Documentary evidence confirming that the learner has offered customer loyalty programmes or additional services according to organisational policies and procedures for at least five (5) customer interactions, signed off by the learner's supervisor		
SE0202	Documentary evidence confirming that the learner has re-served or maintained at least five (5) existing customers in line with organisational processes and procedures.		
SE0203	Documentary evidence confirming that the learner has given the customer a final greeting that encourages the customer to return to the store for at least five (5) customer interactions		

	Contextualised Workplace Knowledge	Date	Signature
1	Organisational policies and procedures for building customer relationships in a full or partial service sales environment		
2	Organisational policies and procedures for re-serving and maintaining existing customers		

3	Organisational policies and procedures for promoting customer loyalty programmes		
4	Organisational policies and procedures for promoting additional customer services		
5	Organisational policies and procedures for promoting a positive and professional image in the workplace		
6	Organisational policies and procedures for housekeeping		

	Additional Assignments to be Assessed Externally	Date	Signature
--	---	------	-----------

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

WM-03-WE01	Sell products using the sales cycle		
	Scope Work Experience	Date	Signature
WA0101	Approach the customer in line with organisational standards		
WA0102	Qualify the customer's needs using questioning techniques		
WA0103	Demonstrate the product in line with organisational standards highlighting product features, advantages and benefits		
WA0104	Link the product benefits to the customer's buying needs		
WA0105	Overcome objections in line with organisational standards		

WA0106	Use closing techniques to close the sale in line with organisational standards		
WA0107	Demonstrate providing after sales service in line with organisational standards		
	Supporting Evidence	Date	Signature
SE0101	Documentary evidence confirming that the learner has complied with organisational procedures when approaching the customer, qualifying the customer's needs, demonstrating the product, linking the product benefits to the customer's needs, overcoming objections, closing the sale and providing after sales service, authenticated by the learner's supervisor, for at least five (5) customers		
SE0102	Documentary evidence confirming the sale for at least five (5) customers served where the sales cycle was demonstrated, signed off by the learner's supervisor		
SE0103	Documentary evidence from the learner, evaluating the reasons for an unsuccessful sale		
WM-03-WE02	Use advanced selling techniques		
	Scope Work Experience	Date	Signature
WA0201	Sell add-on products or supplementary services in line with organisational standards		
WA0202	Use selling up techniques or offer alternative products in line with organisational standards		
WA0203	Prospecting new customers in line with organisational processes and procedures		
	Supporting Evidence	Date	Signature
SE0201	Documentary evidence that the learner has sold add-on products or supplementary services (such as extended warranties, extended guarantees, product protection products, insurance, deliveries or installations), for at least five (5) customers served, signed off by the learner's supervisor		
SE0202	Documentary evidence confirming that selling up		

	techniques or offering alternative products have been used with two (2) customers served, signed off by the learner's supervisor		
SE0203	Documentary evidence confirming that the learner has prospected at least five (5) new customers in line with organisational processes and procedures		

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

	Additional Assignments to be Assessed Externally	Date	Signature
--	---	------	-----------

522301001-WM-04, Cold Chain Control and Perishable Goods Monitoring, NQF Level 3, Credits 12

WM-04-WE01	Work day shift in retail or wholesale outlet		
	Scope Work Experience	Date	Signature
WA0101	Do a floor walk with a manager and complete a hand-over document		
WA0102	Check if Customer Protection Act (CPA) production documentation is in place and valid (correct dates, signatures)		
WA0103	Schedule staff for a week and deal with absenteeism etc. according to workplace procedures or give input to the staff planner		
WA0104	Facilitate a weekly planning meeting and daily focus meeting with team for two weeks		
WA0105	Delegate daily tasks to each member of the team		
WA0106	Monitor all cold chain replenishment activities and disciplines ensuring compliance		
WA0107	Monitor compliance, safety and security of the department		
WA0108	Report on approaching a customer, offering assistance and handling a query		
	Supporting Evidence	Date	Signature
SE0101	Attendance register		
SE0102	Shift hand-over documentation		
SE0103	Floor walk checklist		
SE0104	Weekly report		

SE0105	Meeting documentation		
WM-04-WE02	Work night shift in retail or wholesale outlet		
	Scope Work Experience	Date	Signature
WA0201	Do a floor walk with a manager and complete a hand-over document		
WA0202	Check if CPA production documentation is in place and valid (correct dates, signatures)		
WA0203	Schedule staff for a night shift and deal with absenteeism etc. according to workplace procedures or give input to the staff planner		
WA0204	Facilitate a planning meeting and focus meeting with team for a night shift		
WA0205	Delegate tasks to each member of the team		
WA0206	Monitor all cold chain replenishment activities and disciplines ensuring compliance		
WA0207	Monitor compliance, safety and security of the department		
	Supporting Evidence	Date	Signature
SE0201	Attendance register		
SE0202	Shift hand-over documentation		
SE0203	Floor walk checklist		
SE0204	Night shift report		
SE0205	Meeting documentation		
WM-04-WE03	Work weekend shift in retail or wholesale outlet		
	Scope Work Experience	Date	Signature
WA0301	Do a floor walk with a manager and complete a hand-over document		

WA0302	Check if CPA production documentation is in place and valid (correct dates, signatures)		
WA0303	Schedule staff for a weekend shift and deal with absenteeism etc. according to workplace procedures or give input to the staff planner		
WA0304	Facilitate a weekend shift planning meeting and daily focus meeting with team for two weekend shifts		
WA0305	Delegate daily tasks to each member of the team		
WA0306	Monitor all cold chain replenishment activities and disciplines ensuring compliance		
WA0307	Monitor compliance, safety and security of the department		
WA0308	Report on approaching a customer, offering assistance and handling a query		
	Supporting Evidence	Date	Signature
SE0301	Attendance register		
SE0302	Shift hand-over documentation		
SE0303	Floor walk checklist		
SE0304	Weekend report		
SE0305	Meeting documentation		
WM-04-WE04	Conduct an internal self-audit in retail or wholesale outlet		
	Scope Work Experience	Date	Signature
WA0401	Conduct an internal OHSA self-audit to ensure compliance and identify and rectify deviations and conduct a follow-up with a manager to evaluate effectiveness of rectifications		
WA0402	Conduct an internal hygiene self-audit to ensure compliance and identify and rectify deviations and conduct a follow-up with a manager to evaluate		

	effectiveness of rectifications		
	Supporting Evidence	Date	Signature
SE0401	Checklists indicating finding		
SE0402	Report indicating suggested improvements or rectifications		
SE0403	Monitoring and evaluation sheet		
WM-04-WE05	Plan a special event or promotional activity to promote sales		
	Scope Work Experience	Date	Signature
WA0501	Attend a team meeting with manager and discuss an action plan		
WA0502	Identify requirements for increasing staff volumes and changes of trading hours		
WA0503	Read and interpret the design and theme of the event and display		
WA0504	Identify the products to be displayed and cross-merchandising products and increases in stock volume		
WA0505	Conduct a team meeting with team		
WA0506	Assign and oversee tasks for building the display by taking into account visual appeal and using the identified product and cross-merchandising product identified above		
WA0507	Conduct monitoring and evaluation activities to ensure the effective implementation and of the event and maintaining quality at all times		
	Supporting Evidence	Date	Signature
SE0501	Special event or promotional activity documentation		
SE0502	Monitoring and evaluation report		

	Contextualised Workplace Knowledge	Date	Signature
1	Organisational policies and procedures		
2	Company standards and compliance requirements		
3	Company floor plan and layout		
4	Company products and produce		
5	Company cold chain requirements and compliance standards		

	Additional Assignments to be Assessed Externally	Date	Signature

522301001-WM-05, Perishable Goods Department and Cold Chain Requirements, NQF Level 2, Credits 11

WM-05-WE01	Work for half a day in each of the following departments: Meat, fish, deli, handling finished products and performing cleaning , displaying, replenishing and temperature monitoring tasks		
	Scope Work Experience	Date	Signature
WA0101	Use, clean and store equipment used in the Meat, fish, deli, department		
WA0102	Identify food types, perishable goods and information from labels such as price, sell-by dates, use-by dates ensuring it corresponds with shelf-edge labels		
WA0103	Move goods from receiving/storage to sales area		

WA0104	Remove expired product from the chillers and freezers and move to disposal area		
WA0105	Prevent contamination of perishable goods and apply disposal procedure for contaminated or damaged food products		
WA0106	Handle, repackage and label perishable goods		
WA0107	Conduct price checks on minimum of 10 items to maintain price accuracy		
WA0108	Replenish (merchandise) perishable goods to maintain stock levels in freezers and chillers applying stock rotation and cold chain principles		
WA0109	Replenish perishable goods and maintain shelves with product according to a business packing wire diagram/planogram		
WA0110	Monitor and maintain required temperature in chillers and freezers by conducting daily temperature checks at set intervals		
WA0111	Respond to or escalate basic customer queries		
	Supporting Evidence	Date	Signature
SE0101	Attendance register		
SE0102	Production records or checklists		
WM-05-WE02	Work for a full day in the fruit and veggie department, displaying, performing quality checks, culling, removing expired product, pricing and labelling, replenishing and stock rotation, weighing (where applicable)		
	Scope Work Experience	Date	Signature
WA0201	Use, clean and store equipment used in the fruit and vegetable department		
WA0202	Identify food types, perishable goods and information from labels such as price, sell-by dates, use-by dates ensuring it corresponds with shelf-edge labels		

WA0203	Move goods from receiving/storage to sales area		
WA0204	Remove expired or spoiled product from the shelves		
WA0205	Prevent contamination of perishable goods and apply disposal procedure for contaminated or damaged food products		
WA0206	Handle, weigh, repackage and label perishable goods (where applicable)		
WA0207	Conduct price checks to maintain price accuracy		
WA0208	Replenish (merchandise) perishable goods to maintain stock levels in freezers and chillers		
WA0209	Applying stock rotation and cold chain principles to a business packing wire diagram/planogram		
WA0210	Replenish perishable goods and maintain shelves with product according		
WA0211	Monitor and maintain required temperature in chillers and freezers by conducting daily temperature checks at set intervals		
WA0212	Respond to or escalate basic customer queries		
	Supporting Evidence	Date	Signature
SE0201	Attendance register		
SE0202	Production records and checklists		
WM-05-WE03	Work for half a day in each of the following departments: short shelf life goods and dairy		
	Scope Work Experience	Date	Signature
WA0301	Use, clean and store equipment used in the short shelf live goods and dairy department		
WA0302	Identify food types, perishable goods and information from labels such as price, sell-by dates, use-by dates ensuring it corresponds with shelf-edge labels		

WA0303	Move goods from receiving/storage to sales area		
WA0304	Remove expired product from the chillers and freezers		
WA0305	Prevent contamination of perishable goods and apply disposal procedure for contaminated or damaged food products		
WA0306	Handle, repackage and label perishable goods		
WA0307	Conduct price checks on minimum of 10 items to maintain price accuracy		
WA0308	Replenish (merchandise) perishable goods to maintain stock levels in freezers and chillers applying stock rotation and cold chain principles		
WA0309	Replenish perishable goods and maintain shelves with product according to a business packing wire diagram/planogram		
WA0310	Monitor and maintain required temperature in chillers and freezers by conducting daily temperature checks at set intervals		
WA0311	Respond to or escalate basic customer queries		
	Supporting Evidence	Date	Signature
SE0301	Attendance register		
SE0302	Production records and checklists		
WM-05-WE04	Perform deep cleaning of freezers, chillers and back areas twice during the period		
	Scope Work Experience	Date	Signature
WA0401	Apply relevant personal protective clothing		
WA0402	Empty the freezer or display unit		
WA0403	Strip the freezer or display unit of all loose parts		
WA0404	Clean the freezer, display unit and all loose parts using suitable chemicals		

WA0405	Reassemble the freezer or display unit		
WA0406	Maintain cold chain of items removed from the freezer or display case during the cleaning process		
WA0407	Repack the freezer or display case according to the planogram/wire diagram		
	Supporting Evidence	Date	Signature
SE0401	Attendance register		
SE0402	Cleaning reports and checklists		
WM-05-WE05	Count stock of a department/product range twice during the period		
	Scope Work Experience	Date	Signature
WA0501	Conduct a physical count of product ensuring accuracy as not to inflate or deflate stock		
WA0502	Differentiate where to count per unit or mass		
WA0503	Count bulk product (cases) vs single units ensuring using correct recording		
WA0504	Scan and count vs scan each item where you have multiple products on the same shelf (with different bar codes)		
WA0505	Reconcile physical stock counted with stock sheet and ensure that stock reconciliation variances are accounted for		
	Supporting Evidence	Date	Signature
SE0501	Attendance register		
SE0502	Stock count records		
WM-05-WE06	Maintaining a safe working environment		
	Scope Work Experience	Date	Signature
WA0601	Conduct a floor walk to check that the display area		

	complies with housekeeping and safety requirements		
WA0602	Observe deviations from housekeeping and safety requirements		
WA0603	Take corrective action to address all deviations		
WA0604	Apply organisation policy and procedures for disposing of spoiled or contaminated merchandise		
WA0605	Identify and dispose of chemicals meeting food safety requirements		
WA0606	Alert the supervisor/SHE representative in the event of an accident/incident to a customer or team member		
	Supporting Evidence	Date	Signature
SE0601	Attendance register		
SE0602	Safety checklists/reports		

	Contextualised Workplace Knowledge	Date	Signature
1	Organisational policies and procedures		
2	Company standards and compliance requirements		
3	Company floor plan and layout		
4	Company products and produce		
5	Company cold chain requirements and compliance standards		

	Additional Assignments to be Assessed Externally	Date	Signature
--	---	------	-----------

522301001-WM-06, In-store Merchandising Procedures, NQF Level 2, Credits 15

WM-06-WE01	Read and interpret a wire diagram / planogram and work instruction		
	Scope Work Experience	Date	Signature
WA0101	Identify the layout of the store according to the information on the wire diagram /planogram		
WA0102	Identify various sections of the store according to the information on the wire diagram /planogram		
WA0103	Identify floor, aisle and shelves lay-out, display areas, promotional area, shelf facing items from the wire diagram /planogram		
	Supporting Evidence	Date	Signature
SE0101	Attendance register		
SE0102	List of items as per wire diagram		
WM-06-WE02	Identify types of merchandise and information from labels such as price, sell-by dates, use-by dates		
	Scope Work Experience	Date	Signature
WA0201	Visually identify food types, perishable merchandise, heavy merchandise, multimedia merchandise, fragile merchandise, high risk good, etc.		
WA0202	Identify and apply shelf edge labels		
WA0203	Identify merchandise keeping unit (SKU) number		
WA0204	Read and interpret information on labels		
WA0205	Identify and apply the correct pricing of perishable merchandise		

	Supporting Evidence	Date	Signature
SE0201	Observation checklist		
SE0202	Merchandise correctly labelled		
SE0203	Merchandise categorisation		
WM-06-WE03	Move merchandise from receiving/storage to sales area		
	Scope Work Experience	Date	Signature
WA0301	Lift heavy objects taking the correct physical position and apply safe ergonomic stance		
WA0302	Using right equipment for designed purpose		
WA0303	Stack cages not exceeding height limit		
WA0304	Move dollies and jacks using correct method		
WA0305	Apply correct handling procedures for various categories of merchandise such as heavy merchandise, multimedia merchandise, fragile merchandise and high risk merchandise		
	Supporting Evidence	Date	Signature
SE0301	Supply chain documentation		
SE0302	Standard operating procedures for merchandise movement		
WM-06-WE04	Mark merchandise with labels, tickets and signage		
	Scope Work Experience	Date	Signature
WA0401	Use and apply price labels and tickets as instructed and according to merchandise characteristics		
WA0402	Use or erect promotional signage according to promotional brief		
WA0403	Identify soiled, damaged, illegible or incorrect labels/tickets and take corrective actions		

WA0404	Check and action pricing according to organisational policy		
WA0405	Action price changes according to instruction		
	Supporting Evidence	Date	Signature
SE0401	Manager/supervisor signed off on the shelf/rail/aisle		
WM-06-WE05	Merchandise stock for display (everyday merchandising) and maintain displays		
	Scope Work Experience	Date	Signature
WA0501	Interpret merchandising instructions		
WA0502	Prepare the merchandising area (shelf/rail/floor) in compliance with safety and housekeeping requirements		
WA0503	Collect merchandise from the merchandise room and verify it is correct		
WA0504	Prepare for everyday merchandising		
WA0505	Check quantity, price and quality of merchandise		
WA0506	Replenish shelves/rails/floor		
WA0507	Verify information on shelf edge labels is accurate according to merchandise information		
WA0508	Identify merchandise shortages		
	Supporting Evidence	Date	Signature
SE0501	Display signed off by manager/ supervisor		
WM-06-WE06	Create and maintain displays for a special event by merchandising merchandise		
	Scope Work Experience	Date	Signature
WA0601	Prepare the display area according to instruction and housekeeping standards		

WA0602	Prepare merchandise as operational requirements		
WA0603	Prepare the display equipment		
WA0604	Merchandise the display		
WA0605	Escalate possible merchandise shortages in order to enhance efficiency of the supply chain		
	Supporting Evidence	Date	Signature
SE0601	Display signed off by manager/ supervisor		
WM-06-WE07	Comply with safety and housekeeping whilst marking and displaying merchandise		
	Scope Work Experience	Date	Signature
WA0701	Conduct a floor walk to check that the display area complies with housekeeping and safety requirements		
WA0702	Observe deviations from housekeeping and safety requirements		
WA0703	Take corrective action to address all deviations		
	Supporting Evidence	Date	Signature
SE0701	Sign off by manager/ supervisor as per SOP		
WM-06-WE08	Prevent shrinkage whilst marking and displaying merchandise.		
	Scope Work Experience	Date	Signature
WA0801	Ensure correct merchandise is received according to relevant documentation		
WA0802	Identify and monitor merchandise levels of high risk items		
WA0803	Identify unsaleable merchandise and move off the floor		
WA0804	Rotate merchandise to minimise stock losses		

WA0805	Identify and escalate stock loss trends		
WA0806	Prevent merchandise from being damaged or soiled by using correct handling techniques		
	Supporting Evidence	Date	Signature
SE0801	Record of weekly interaction with supervisor		
SE0802	Merchandise requisition form		
WM-06-WE09	Prepare for and count stock		
	Scope Work Experience	Date	Signature
WA0901	Prepare for stock count		
WA0902	Apply manual and electronic count procedures		
WA0903	Identify stock errors		
WA0904	Record the results of stock count on the required documents		
WA0905	Perform post stock count housekeeping functions		
	Supporting Evidence	Date	Signature
SE0901	Stock counting records		

	Contextualised Workplace Knowledge	Date	Signature
1	Organisational policies and procedures		
2	Company standards and compliance requirements		
3	Company floor plan and layout		
4	Company products and		

	produce		
5	Company cold chain requirements and compliance standards		

	Additional Assignments to be Assessed Externally	Date	Signature
--	---	------	-----------

DRAFT