

# **Level 1 and 2 and First Skills**

in

**Occupational Studies**  
**Retail**

S P E C I F I C A T I O N

## **Revised Pilot Version**

## **Double and Single Award**

For first teaching from **Autumn 2004**  
For first certification for Double and Single Award in  
**Summer 2005**

## **Section 4**

# **Retail Specification**

**Draft**

## **Introduction**

This document contains the specification for Retail which is one of the eleven areas offered within the CCEA Occupational Studies qualification. It should be read in conjunction with the publication entitled *CCEA Occupational Studies: Qualification Overview*.

There are four units within the Retail programme. These are:

- Unit 1: Understanding the retail industry
- Unit 2: Payment, stock and storage
- Unit 3: Merchandising and Display design
- Unit 4: Customer service

This suite of four units is designed to provide an introduction to work in retail, but further study will be needed to prepare the pupil for employment. Learners will recognise that retailing is the largest part of the service sector of the economy and by its very nature it is a people-centred activity. These four units should only be studied if the learner has direct experience of working in the sector (ie through work placement or a suitable alternative).

## **Aims**

- To introduce the learner to the possibility of a career in the retailing industry.
- To develop an interest in issues related to a variety of aspects of retailing.
- To develop an understanding of health, safety, and economic issues relating to work in retailing.
- To develop practical skills as a stepping stone for further study in retail-related subjects or employment.

## **Assessment Aims**

Each of the units will assess the learner's:

- understanding of the demands of working in the retailing industry;
- application of theoretical knowledge of retailing in a practical context;
- knowledge of basic procedures used in retailing and in related industries;
- practical ability in a range of retail-related skills.

## **Assessment Objectives**

Throughout this course learners will be required to:

- (a) recall knowledge and understanding of the specified context; **(AO1)**
- (b) apply their knowledge, understanding and skills in occupational contexts and tasks; **(AO2)**

- (c) analyse and evaluate their work and make judgements about their performance, indicating where improvements could be made. (AO3)

**Assessment Objective Weightings**

<b>Assessment Objective</b>	<b>Weighting (%)</b>
<b>AO1</b>	20%
<b>AO2</b>	60%
<b>AO3</b>	20%

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## **RETAIL**

### **UNIT 1**

### **UNDERSTANDING THE RETAIL INDUSTRY**

#### **Description of unit**

This unit is suitable for those who wish to gain a basic understanding of the retail industry and who may be interested in pursuing careers within this diverse industry. Learners will be able to explore how the retailing industry operates on a variety of levels, from range of outlet, to geographical location, to product. To maximise the potential learning of this unit the learner must be placed in a retail organisation to gain the necessary hands on experience.

#### **Structure of unit**

This unit is divided into three sections:

Section 1	Types of retail outlets and geographical influences
Section 2	Types of products
Section 3	Health, safety and security in the retail industry

#### **What you need to learn**

##### **Section 1 Types of retail outlets and geographical influences**

At the end of this section the learner should be able to:

- understand the variety of retail outlets eg specialist, cash and carry, wholesale, multiples, markets, local shops, supermarkets, mail order;
- identify the major functions of retailing – physical movement of goods, availability of a range of goods, change of ownership, advice to potential customers, other services to customers;
- investigate the related industries (manufacturing, distribution, warehousing, transport and marketing);
- understand the concept of retail competition – the role of competition, forces, responses by retailers (price, location and service);
- investigate the geography of retail outlets:
  - the location of retail outlets identified,
  - growth of retail parks explained,
  - the role of shopping centres identified,
  - the role of local shops understood, and
  - the impact of retail outlets on the community within which the learner lives.

## **Section 2      Types of products**

At the end of this section the learner should be able to:

- research the wide range of products available;
- identify differences between imports and exports;
- understand the role of brand labels and their appeal to the purchaser;
- identify counterfeit goods and the effects on the mainstream retail market;
- show an awareness of the relevant legislation (eg Trade Descriptions Act, Consumer Law);
- identify the factors which affect prices (trade costs, mark up, VAT, profit).

## **Section 3      Health, safety and security in the retail industry**

At the end of this section the learner should be able to:

- be aware of the main principles of the Health and Safety at Work Act; and
  - workplace (health, safety and welfare) regulations;
  - display screen equipment regulations;
  - the provision and use of work equipment regulations;
  - the manual handling operations regulations;
  - fire precautions regulations;
- identify any hazards in the workplace and the associated risk factors;
- know when and how to take action to rectify unsafe or hazardous situations;
- examine workplace policies for controlling risks eg safety policy, codes of practice, safety officer – and identify action to be followed in cases of fire and emergency;
- be aware of his/her role in ensuring the retail environment is a safe and healthy place to work.

## **Assessment Criteria for Unit 1**

A maximum of 25 marks will be available for this unit.

### **Band C [1 – 9 marks]**

To be awarded marks in Band C, the learner will have demonstrated:

- possession of a limited range of knowledge of the retail industry and understanding of the diverse nature of it;
- possession of a limited range of knowledge which will contribute to the role he/she can play when engaging in their work role in the retailing industry;
- the ability to produce a basic account or commentary of the work undertaken or the materials produced;
- basic practical and communication skills in carrying out each of the above tasks or activity;
- an understanding that work in retailing is only one part of a larger social and economic context.

### **Band B [10 – 17 marks]**

To be awarded marks in Band B, the learner will have demonstrated:

- possession of a range of knowledge of the retail industry and understanding of the diverse nature of it;
- possession of a range of knowledge which will contribute to the role he/she can play when engaging in their work role in the retailing industry;
- the ability to produce a reasoned account or commentary of the work undertaken or the materials produced;
- basic practical and communication skills in carrying out each of the above tasks or activity to an acceptable standard;
- an understanding of the role of retailing in social and economic contexts.

### **Band A [18 – 25 marks]**

To be awarded marks in Band A, the learner will have demonstrated:

- possession of a broad range of knowledge of the retail industry and understanding of the diverse nature of it;
- possession of a broad range of knowledge which will contribute to the role he/she can play when engaging in their work role in the retailing industry;
- the ability to produce a critical account or commentary of the work undertaken or the materials produced;
- basic practical and communication skills in carrying out each of the above tasks or activity to a high standard which would be acceptable in a real working retail environment;
- an understanding of how work in the retail industry contributes to the wider social and economic context.

## UNIT 2

## PAYMENT, STOCK AND WAREHOUSING

### Description of unit

This unit is suitable for those who wish to gain a basic understanding of the retail industry and who may be interested in pursuing careers within this diverse industry. Learners will be able to explore the areas of payment, stock and warehousing. To maximise the potential learning of this unit the learner must be placed in a retail organisation to gain the hands on experience.

### Structure of unit

This unit is divided into three sections:

Section 1	Processing Payments
Section 2	Stock
Section 3	Warehousing

### What you need to learn

#### Section 1 Processing Payments

At the end of this section the learner should be able to demonstrate the following:

- show an understanding of the main forms of payment – cash, cheques, credit cards, debit cards;
- show an ability to work with money eg handle cash correctly;
- calculate the price of customer's purchases;
- process sales payments.

#### Section 2 Stock

At the end of this section the learner should be able to:

- understand stock control procedures – display;
- use information technology in stock control;
- maintain stock on display – check levels of stock on display;
- find correct stock to fill up stock levels;
- use correct equipment to move stock (eg baskets, trolleys, cages);
- use correct lifting and carrying methods;
- rotate stock according to organisation procedures;
- price goods on display correctly;
- assist in identifying and reporting damaged stock;
- return equipment to the right place after use;
- follow health and safety practice.

### **Section 3      Warehousing**

At the end of this section the learner should be able to:

- investigate storage and warehousing issues – range of facilities needed for display / storage of goods identified;
- demonstrate an awareness of appropriate facilities identified for products;
- find correct storage area;
- use correct equipment to move stock;
- use correct lifting and handling methods;
- handle stock safely;
- assist in rotating stock according to organisational procedures;
- place stock in the correct place in the storage area eg cupboard, stockroom, warehouse;
- return equipment to the right place after use.

#### **Assessment Criteria for Unit 2**

A maximum of 25 marks will be available for this unit.

#### **Band C [1 – 9 marks]**

To be awarded marks in Band C, the learner will have demonstrated:

- possession of a limited range of knowledge of how to process payments, stock control procedures and the importance of quality warehousing procedures;
- possession of a limited range of knowledge which will contribute to the role he/she can play when engaging in their work role in the retailing industry;
- the ability to produce a basic account or commentary of the work undertaken or the materials produced;
- basic practical and communication skills in carrying out each of the above tasks or activity;
- an understanding that work in retailing is only one part of a larger social and economic context.

#### **Band B [10 – 17 marks]**

To be awarded marks in Band B, the learner will have demonstrated:

- possession of a range of knowledge of how to process payments, stock control procedures and the importance of quality warehousing procedures;
- possession of a range of knowledge which will contribute to the role he/she can play when engaging in their work role in the retailing industry;
- the ability to produce a reasoned account or commentary of the work undertaken or the materials produced;
- basic practical and communication skills in carrying out each of the above tasks or activity to an acceptable standard;
- an understanding of the role of retailing in social and economic contexts.

**Band A [18 – 25 marks]**

To be awarded marks in Band A, the learner will have demonstrated:

- possession of a broad range of knowledge and awareness of how to process payments, stock control procedures and the importance of quality warehousing procedures;
- possession of a broad range of knowledge which will contribute to the role he/she can play when engaging in their work role in the retailing industry;
- the ability to produce a critical account or commentary of the work undertaken or the materials produced;
- basic practical and communication skills in carrying out each of the above tasks or activity to a high standard which would be acceptable in a real working retail environment;
- an understanding of how work in the retail industry contributes to the wider social and economic context.

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## UNIT 3

## STORE DESIGN AND MERCHANDISING

### Description of unit

This unit is suitable for those who wish to gain a basic understanding of the retail industry and who may be interested in pursuing careers within this diverse industry. Learners will be able to explore the skills required for effective store design and layout. To maximise the potential learning of this unit the learner must be placed in a retail organisation to gain the hands on experience.

### Structure of unit

This unit is divided into two sections:

Section 1	Store design and layout
Section 2	Merchandising

### What you need to learn

#### Section 1 Store design and layout

At the end of this section the learner should be able to:

- understand the importance of the shop front to attract attention eg name above the door, use of colour, window display;
- appreciate store layout for maximising opportunity for customers to be exposed to what is on offer eg:
  - customer convenience;
  - shopper traffic flow through store;
  - in store location of particular merchandise;
  - purchasing relationships between classes of goods;
  - stock replenishment;
- appreciate the role of image and investment in refurbishment/refurbishment;
- understand the significance of ambiance – heat, light, sound, smell, hygiene.

#### Section 2 Merchandising

At the end of this section the learner should be able to:

- classify and arrange merchandise eg
  - impulse goods;
  - convenience goods;
  - necessities or staple goods;
  - utility goods;
  - luxury and major expense items;
- recognise the significance of what is a good position – where to place high service lines, browsing lines;
- identify horizontal and vertical blocking and the effectiveness of each;
- recognise the importance of display techniques – step, pyramid, zig zag, fan;
- create interest – stimulating customers, seasonality;

- identify the role of the manufacturer eg mars offer companies merchandising plans;
- understand systematic space and shelf allocation and proportionality to profitability;
- identify good and not so good selling sites in the store.

### **Assessment Criteria for Unit 3**

A maximum of 25 marks will be available for this Unit.

#### **UNIT 3 STORE DESIGN AND MERCHANDISING**

##### **Band C [1 – 9 Marks]**

- Possession of a limited knowledge of store design and merchandising.
- Identify a basic store layout for maximising the opportunities for customers to be exposed to merchandise convenience shopping.
- Possession of a limited knowledge of the location of store control in relation to particular merchandise.
- Possession of a limited knowledge of the role of image in publicity and design of layout and displaying techniques.
- Possession of a limited knowledge of the arranging of merchandise to cover such goods as basic, impulse, convenience and staple goods.

##### **Band B [10 – 17 Marks]**

- Possession of a range of knowledge of store, design, layout, display and merchandising, including the explanation and evidence in the creation of interest to stimulate customer purchase.
- Possession of a range of knowledge which will contribute to an acceptable standard in appreciation of store layout for maximising opportunity in a range of areas, such as, customer convenience, shopping traffic flow, store location of merchandise.
- Possession of an understanding and an ability to produce evidence showing how investment in refurbishment/refurbishment of a store including heat, light, sound, smells and hygiene requirements.
- An understanding in classifying and arranging merchandise such as, impulse, convenience, necessities/staple, utility and luxury or expensive goods.
- Recognise and show understanding of good position, browsing lines and service lines and identify and explain horizontal and vertical blocking and their effectiveness.

Band A [18 – 25 Marks]

- The possession of a broad range of knowledge of the store design, layout and merchandising including a detailed explanation and evidence in the creation of interest to stimulate customer purchase.
- A broad knowledge showing the importance of shop front attraction, such as, window displays and shop fronting.
- Demonstrate a clear understanding of store layout for maximising opportunity for customers to be exposed to a range of merchandise through refurbishment/refurbishment.
- Demonstrate a clear possession of the classification and merchandising of a range of goods from stable through to the expensive and luxury goods market.
- A clear ability to demonstrate and identify blocking and effectiveness in store design and layout, including the importance of display techniques to stimulate customers through the gambit of the seasonal trade.

## **UNIT 4**

## **CUSTOMER SERVICE**

### **Description of unit**

This unit is suitable for those who wish to gain a basic understanding of the retail industry and who may be interested in pursuing careers within this diverse industry. Learners will be able to explore what constitutes effective customer care, investigating personal skills and communication. To maximise the potential learning of this unit the learner must be placed in a retail organisation to gain the hands on experience.

### **Structure of unit**

This unit is divided into three sections:

- |           |                                   |
|-----------|-----------------------------------|
| Section 1 | What is customer care?            |
| Section 2 | Working with customers            |
| Section 3 | Making sure your customers return |

## **What you need to learn**

### **Section 1 What is customer care**

At the end of this section the learner should be able to:

- understand the need for customer service (purpose);
- be aware of the main reasons why quality service is important eg growth of service industry, increased competition, greater understanding of consumers and quality, and customer service makes economic sense;
- understand how to treat customers – anticipate their needs - understanding, welcome, comfort;
- identify the needs of customers – what services does the retail organisation provide, what are the characteristics of the services it provides;
- understand the different roles within customer service – serving, selling, advising, passive, proactive;
- identify appropriate role for dealing with complaints.

### **Section 2 Working with customers**

At the end of this section the learner should be able to:

- demonstrate an ability to work with customers;
- show the personal skills appropriate to different situations – positive attitude – achieving the right impression;
- recognise the importance of courtesy, tact and diplomacy;
- identify the manner in which to represent the organisation to its customers – communicating best image – first impressions, personal hygiene, personal habits;
- understand the importance of good communication - body language – facial expression, gestures, personal space, tone etc.

### **Section 3 Making sure your customers return**

At the end of this section the learner should be able to:

- identify what he/she can do to make sure customers return;
- understand how to handle complaints;
- identify common complaints.

## Assessment Criteria for Unit 4

A maximum of 25 marks will be available for this Unit.

### UNIT 4 CUSTOMER SERVICE

#### Band C [1 – 9 Marks]

- The possession of a limited knowledge of customer service.
- The possession of a limited knowledge in dealing with complaints.
- The possession of a limited ability to demonstrate how to deal with customers.
- The possession of a limited knowledge in the recognition of courtesy, diplomacy and tact in dealing with customers
- The possession of a limited ability to handle complaints.

#### Band B [10 – 17 Marks]

- Possess the knowledge to explain the purpose of customer service.
- Possess the ability in dealing with customers.
- Possess the ability to work with customers and recognise the importance of courtesy, tact and diplomacy.
- Possess a range of knowledge and ability to handle complaints and deal with awkward situations.
- Identify and evaluate good practice ensuring that customers will return.

#### Band A [18 – 25]

- Possess a broad knowledge of customer service.
- Possess a broad knowledge in dealing with a range of customers.
- Possess a broad range in working with customers and recognise the importance of courtesy, tact and diplomacy.
- Possess a broad understanding and ability to handle a range of customer complaints and deal with awkward situations that may arise in dealing with customers.
- Possess and evaluate the use of good practice in the industry to ensure customer satisfaction and their return.