

skills **NOW**
Learn & Do

Certificate II in Retail

SIR20207 V 1.3

BOOK 1: NOTES & IDEAS



NAME:

TEL:

How to use this training resource

skills NOW training principles

All skills NOW’s “Learn & Do” training resources follow the quality principles as specified by the National Quality Council (NQC) which are that any resource should:

1. Cater effectively for the needs of three different audiences – Trainees, Trainers and Assessors.
2. Be relevant to its audience and its intended purpose
3. Make sense - is it logical in approach and content?
4. Be a product which trainers can teach from and trainees can learn from.
5. Specifically state which training package (TP) the units of competency relate to.

All skills NOW retail packages follow four further important training principles:

- “Learn by doing” – effective vocational training is best achieved if the trainee performs practical learning activities.
- “Retail is detail” – effective retailers are multi-skilled – training should focus on doing many small things well.
- “What can you do?” – knowledge and skills build staff self confidence and encourage initiative so that trainees can play a more positive role in their workplace to enhance career opportunities.
- “KISS” – “keep it simple stupid”. Our material is written in short, simple English so that it is far easier to use than overblown and padded alternatives.

Regrettably there are knowledge gaps in several of the SIR20207 Certificate II in Retail units of competency which adversely affect their practical value eg display planograms are not included at all, even though they are used by most modern retailers. Our units include information on such topics so that they are up to date and more relevant to the needs of today’s retailers.

Retail Certificate courses consist of many individual units of competency. skills NOW provides a supplementary ‘Getting started in retail’ unit to provide a framework to put all separate units and activities in an industry context.

Units of competency - this resource

To be assessed as competent in SIR20207 Certificate II in Retail nine core units and five elective units must be completed - fourteen units in all. Our package covers the core units plus six electives – fifteen in all. Units provided are:

CORE UNITS

ELECTIVE UNITS

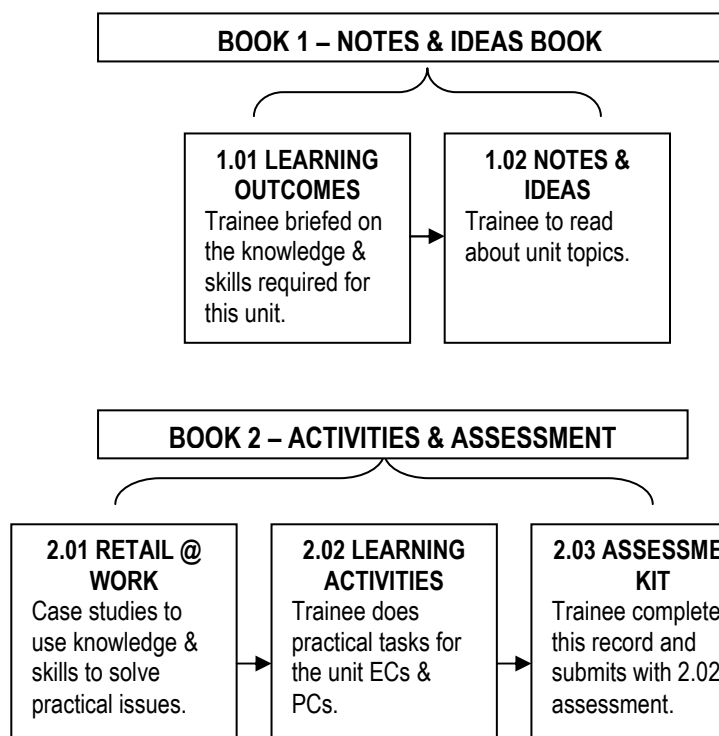
SIRXIND001A	Work effectively in a retail environment	SIRXSLS001A	Sell products and services
SIRXCOM001A	Communicate in the workplace	SIRXSLS002A	Advise on products & services
SIRXOHS001A	Apply safe working practices	SIRXMER001A	Merchandise products
SIRXCLM001A	Organise and maintain work areas	SIRRFSA001A	Apply food safety practices
SIRXCCS002A	Interact with customers	SIRXINV002A	Maintain and order stock
SIRXICT001A	Operate retail technology	SIRXFIN001	Balance a point of sale terminal
SIRXCCS001A	Apply point of sale handling procedures	SNR001	Getting started in retail* *not part of the formal course and not assessed.
SIRXINV001A	Perform stock control procedures		
SIRXRSK001A	Minimise theft		

skills NOW Sample Retail Certificate II V1.3

The skills NOW elective units have been selected as those most likely to be useful if employed in a retail environment eg. Apply food safety practices has been included as the fast food industry is a common entry point for retail employment.

skills NOW format

The skills NOW Retail Certificate II kits are fully integrated with the units of competency and performance criteria for in SIR20207 Certificate II in Retail. The kits consist of two books (a Trainer Guide is also available):



This is a resource book - trainees are provided with an overview of each unit of competency and read about them. The notes cover the ECs and PCs for each unit. On completion of the course, this should be retained by the trainee as an ongoing reference.

This is a practical trainee workbook covering class and other exercises, tasks and assessment activities.

The trainee completes the assessment kit for each unit and submits this for assessment. Trainers/assessors may retain completed units as evidence of assessment.

Book 1, Notes & Ideas has two parts:

1.01 Learning outcomes

Knowledge & skills for this unit

This is an introduction to each unit for the trainee. It describes in everyday language the key points for the unit including a brief summary of the knowledge and skills required. Preferably the trainer would discuss the unit with the trainee or, if this is not possible, the trainee may read it as an exercise.

Unit learning plan

On completion of the Learning outcomes, the trainer and trainee are to complete a “Learning plan” for the unit to ensure that it is completed according to a specific schedule. The table shows a name and number of each unit and also related units which may have similar content – it is recommended that these are completed together to save time and minimise unnecessary duplication.

This package sets out units and tasks in a logical sequence, but in a retail workplace many tasks are done in response to an urgent need or supervisor direction is such as ‘tidy up the sock display’. Many of the elements of competency are part of a stream of events; for example in a simple sale the terminal operator will greet the customer, enter or scan the product, complete the cash transaction and finalise the sale.

skills NOW Sample Retail Certificate II V1.3

This is a fully integrated package by which trainees employed in retail can record their activities and use this learning plan to map these against elements of competency for assessment purposes.

Practical activities to be completed in the workplace are marked as "On job ". Other activities are marked as "Other ". Some of these other activities are also included as Retail@work exercises.

Tick the activity when completed.

At the end of each assessment task in 2.02 Tasks and learning activities, there is a panel which should be ticked to indicate the nature of the activity performed.

A. TASK	B. ACTIVITY	C. RPL

A indicates that the numbered task has been completed. No further action is required.

B indicates that the trainee has completed practical activities for the element. The trainee should provide evidence of completion such as a witness statement by the supervisor or trainer. These can be recorded in within the unit or in 2.03 Assessment kit Part B.

C indicates that the trainee seeks claim recognition of prior learning or experience in this area, for example, two years experience as a terminal operator in a Coles supermarket. The trainee should provide evidence such as a qualification or proof of employment. This can be recorded in 2.03 Assessment kit Part C.

For assessment purposes at least one box should be ticked.

The learning plan should be developed in conjunction with the supervisor/trainer to ensure that all achievements are properly recorded and recognised.

1.02 Notes & ideas

Read & learn about the topics

Each unit commences with a Reader's guide which describes the major headings which correspond with unit elements of competency. A feature of skills NOW content is that it is up to date, practical and in accordance with current retail practices. It includes important content sometimes omitted from the formal SIR07 units such as planograms, bar codes, GST and shelf labels. Where relevant, such material is included in the notes but not in the assessment process.

Go to Book 2 for the remaining three parts.

2.01 Retail @ work

Apply your knowledge & skills

This is primarily a trainer resource using a case study or scenario format. More than 45 cases are provided, most of which are mapped to elements of competency. Trainers can determine which cases are to be done and whether to use them for class activities or as individual trainee tasks.

Completed cases can be recorded in the 2.03 Assessment kit as evidence of achievement but for assessment purposes the more detailed and specific 2.02 Tasks and learning activities should be used.

2.02 Tasks & learning activities

Test your knowledge & skills

Trainees complete practical tasks, activities and questions to confirm their knowledge and skills. This package uses for than 350 tasks and questions to verify knowledge and skills. The process is that the trainee completes each task. These are checked by the trainer/assessor. A check box is provided for each to be ticked ✓ or initialled by the trainer/assessor as each is completed.

A summary table is provided for each unit to be initialled by trainee, trainer, employer or third party.

The format for each unit of competency is:

1. Each element of competency is shown in a shaded panel such as:

5. Follow routine instructions

2. Each performance criteria is shown in italics and in bold type such as:

5.01 *Receive and act upon instruction*

All elements of competency and performance criteria are taken verbatim from the official SIR07 Retail Services package and have not been edited by skills NOW so there is an inbuilt skills mapping process.

3. Tasks and learning activities

The trainee completes tasks or learning activities which directly match the performance criteria.

4. The completed activities are checked and signed off by relevant parties.

Validation and Moderation

The above process means that the assessment standards of validation and moderation are automatically met. Unit content standards are satisfied as the assessment tasks and questions specifically match unit elements of competency and performance criteria. Records of the assessment can be easily retained as evidence.

Moderation is to ensure that all trainees are assessed to a uniform standard. The assessment tasks and questions can be completed in writing or orally and used to ensure that common assessment standards are achieved.

2.03 Assessment kit

Your record for assessment

This is to be completed by the trainee, and provides a summary of all trainee accomplishments for each unit of competency:

- Completed activities
- Other practical activities
- Recognition of prior learning
- Employability skills
- Trainee assessment record.

These can be modified according to trainer need and retained as evidence.

skills NOW - this book

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UNIT SAMPLE

The following is a sample of **SIRXMER001A Merchandise products**. There first two parts are in Book 1 and the remaining three are in Book 2.

Book 1 is to be a resource book to be retained by the trainee as a reference after training is completed.

Book 2 is a workbook to be used for the various activities. All or part can be retained by the trainer/assessor as evidence of assessment.

13 SIRXMER001A Merchandise products

SIRXMER001A Merchandise products is a core unit for Community Pharmacy and an elective unit for Retail and Wholesale and Certificate courses Level II.

1.01 Learning outcomes

Knowledge & skills for this unit

When you have completed this unit, you should know how to handle merchandise within a retail store including the arrangement and presentation of merchandise, setting up and maintaining displays and labelling and pricing stock.

To achieve their full sales potential, retailers need to merchandise products effectively. This unit shows how to improve merchandise presentation.

Retail employers seek imaginative staff who can improve sales with better displays and product merchandising. If you can develop these skills then your employment and career prospects will be enhanced.

All skills and activities need to comply with store policies and procedures and any relevant government safety, storage and other regulations.

Knowledge

Locate, place and arrange merchandise in your store

Understand why good labelling and ticketing is important in merchandise presentation

Important skills

To do this you need to:

- Unpack and store merchandise
- Place merchandise on floor, fixtures and shelves in the correct locations
- If the store uses display planograms, fill according to the planogram layout
- Display merchandise to provide an attractive fully stocked appearance to improve sales
- Identify and remove any damaged, soiled or out of date stock
- Ensure that products placed match fixture, ticketing, prices or bar code locations
- Ensure that stock presentation conforms to any special requirements such as weight or height

To do this you need to:

- Know how display labels and tickets are printed or prepared and used according to store policies
- Ensure that display labels and tickets are regularly checked so that they are current, neat, not damaged and easy to read
- Ensure that all tickets and shelf labels which are soiled, damaged, illegible or incorrect are promptly replaced
- Ensure that any electronic ticketing or other labelling equipment used is properly maintained and stored a safe, secure location

Knowledge

Ensure that price labels and tickets are correct

Ensure that displays are maintained at a high presentation standard so that they are attractive for shoppers.

Understand that stock should be protected from theft and damage

Know the importance of interesting, appealing displays in attracting target shoppers.

Understand that to attract shoppers to the display it must be interesting - 'new and fresh' ideas are required

Important skills

For this you need to ensure:

- That all labels and tickets are placed on the correct merchandise
- Soiled, damaged or incorrect labels and tickets are promptly replaced
- Shelf labels and tickets carry correct pricing and product information

To do this you need to ensure that:

- Any special promotion displays are reset or dismantled at the end of the promotion
- Store planograms or layout specifications are maintained
- Fixtures are not overloaded eg heavy products so as to cause damage to fixtures or create a shopper hazard
- Remove any unsuitable or out of date displays and replace
- Stock levels and orders are sufficient to prevent out of stocks
- Displays are maintained in a clean and tidy condition
- Any excess stock, packaging and other materials is removed from display areas

To do this you should ensure that:

- Stock is carefully handled to prevent damage
- Stock to displayed or stored to prevent damage eg due to water, dust or sunlight
- Stock is displayed and stored according to government regulations such as pharmacy products
- Special attention is given to location of highly pilferable items to reduce theft

To do this you should know:

- The products to be displayed?
- Which shoppers does the display target?
- What are the measurable objectives of the display?
- Which factors which may affect the creation of the display?
- What resources are required to create the display?

To achieve this you should:

- Follow effective display principles and seek new display ideas
- Obtain feedback on display ideas from staff and shoppers and trial them prior to implementation
- Monitor display performance and gain shopper feedback.

To complete the Learning plan for this unit go to Book 2 and find the plan under this unit heading. Work with your trainer to finalise the plan and manage it to ensure that the unit is completed on time.

1.02 Notes & ideas

Read & learn about the topics



Reader Guide

These notes for **Merchandise products** have five major headings which cover or exceed the elements of competency and performance criteria essential for this unit.

Display areas and locations describes the types of display area in a retail outlet.

Place and arrange products cover how to do this to ensure that displays are attractive and appealing.

Prepare display labels and tickets is to ensure that products have suitable tickets to stimulate sales.

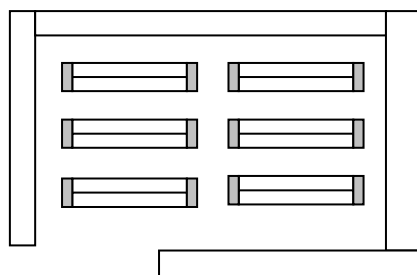
Place, arrange and display price tickets and labels – the correct ticket in the correct location.

Maintain displays – regularly refurbish displays to maintain their condition and shopper appeal.

Display areas and locations

In most retail outlets, floor space will be allocated for standard range products and for promotions. A common layout is like this:

STORE LAYOUT



Range displays 

Promotional displays 

The range products will be displayed on appropriate fixtures and fittings such as shelving for packaged goods, pegboard hooks for small items such as hardware or stationery, stacks for bulky items such as potting mix or racks for clothing or footwear.

In this layout the promotional displays are on gondola ends (sometimes called caps) but other sales locations or displays may be used such as tables, special or supplier displays.

GONDOLA
Range merchandise



GONDOLA END OR CAP
Used for special displays or promotions or range products in smaller stores.

The range objective is to provide an attractive display to maximise sales of everyday consumer products. Keys are:

- The product should be easy to find
- The product should be in stock
- Related products should be easy to find
- Pricing should be easy to read and accurate

The promotional objective is to maximise sales for a special event such as launch of a new product, Christmas or a store wide promotion such as 'Winter Sale'. In these displays, ticketing plays a major part in publicising the event and promoted products. Some items will be sold from promotional displays but often, smaller items may be sold from their regular stock locations. The displays and signage should communicate the event.

In smaller stores, most space is usually allocated to regular range items which can mean that promotional products are under-spaced which can result in lost sales due to poor display and out of stocks.



SUPPLIER UNITS

Many retailers use supplier units which may be serviced by supplier staff. It is important that these are well maintained. Care should be taken with temporary cardboard displays which can clutter aisles.



Product location

Product display and location will depend on the type of merchandise sold and issues relative to the products.



GOVERNMENT REGULATIONS

In areas such as pharmacy, chemicals and tobacco, product sale, display and storage must be according to relevant government regulations – the outlet must comply.



CLOTHING AND FOOTWEAR

These categories tend to carry fewer products but these may be in several different styles, colours and sizes. Stock should be regularly tidied and stock placed in the correct location.



SIZES AND COLOURS

This shirt rack displays the stock by colour and then by size within each colour. An alternative would be to display by size and then by colour within each size. The retailer needs to choose the most suitable display for the product.

Place and arrange merchandise

Retailers carry many different types of product which could include:

- Consumer packaged goods (CPGs) – general merchandise such as groceries, liquor, health and beauty products, hardware.
- Fresh, perishable foods such as meat, fruit and vegetables.
- Apparel – men's, women's, children's clothing.
- Pharmacy and hazardous goods. Pharmacy items must be displayed, stored and sold according to government regulations. Similar restrictions apply to hazardous goods such as inflammables or toxic chemicals.

The handling of merchandise in store will depend upon the type of product sold. A large supermarket could for example stock most of the above product types. The store would have different procedures for handling each type such as meat, fruit and vegetables, frozen foods and general merchandise so that staff need to know the procedures applicable for each.

In practice, retailers will have procedures for:

- Unpacking of merchandise such as the processing location, merchandise checking, removal and disposal of unwanted packaging and distribution of stock to store departments or storage areas. This will include advising appropriate staff of stock availability.
- Merchandise placement on the floor, fixtures and shelves in specific locations. This is particularly important with pharmacy products as drug scheduling regulates product location and display.
- Merchandise display – usually to achieve a balanced fully stocked appearance it is necessary to bring all stock forward such as to the front of each shelf.
- Removal and disposal of damaged, soiled or out of date stock
- Placement of stock to conform with fixtures, ticketing, or shelf labels
- Shelf or other stock labels or ticketing to be up to date and clearly identify products and pricing.
- Stock rotation so that the oldest stock (near use by date) is sold first.
- Stock handling and presentation to conform to safety requirements.

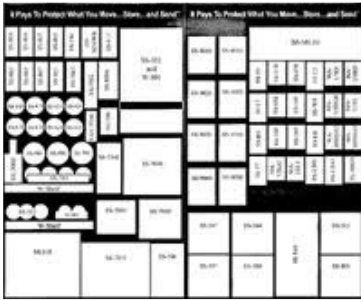
Planograms

Even small retail outlets such as hardware stores and pharmacies may carry thousands of different products. A typical large supermarket will carry 20,000 stock keeping units (SKUs). It is important that these are well managed so that shoppers can find the products which they seek and so that the retailer can stay in stock and order stocks as necessary.

Retailers have always (and still) allocate space according to planned or estimated sales. A toy shop could allocate three lineal metres to dolls, four to pre-school toys and two to beach toys and select a range of products to fit within the space.

Computer technology from the 1970's enabled retailers and suppliers to monitor sales by product which enabled them to create 'planograms' or detailed display maps which would improve sales through better retail product ranging, use of space and stock management.

A planogram is a detailed layout map for a specific category or range of supplier products. It will usually be designed by retail or supplier management and implemented by staff. A common staff task is to update a display according to a new planogram.

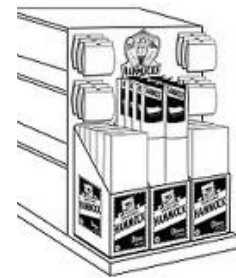


PLANOGRAM INFORMATION
 To prepare a planogram the retailer needs to:

- Determine the products to be displayed
- Decide on the most appropriate fixturing
- Know the product dimensions – H, W and D
- Determine the number of facings for each product
- Determine product location – display related products together

Many smaller retailers will not use the term ‘planogram’ at all but in practice will use them in conjunction with their suppliers. For example, a convenience store would have a daily bread delivery which would have been determined and displayed with the help of suppliers. Other suppliers would provide assistance with ranging, fixturing and display.

PRODUCT SIZE AND SHAPE
 In a given category or displays, there may be products of different type, size and shapes which will affect fixturing and display.



To set up and maintain a planogram display, the process is:



1. Determine display, products, space, fixtures & fittings

2. Design the planogram

3. Install the planogram and fill with stock

4. Review the display & refill to ensure that it is stocked according to plan

Prepare display labels and tickets

Signs, tickets and labels are important retail devices for communicating to shoppers. To minimise shopper confusion, it is important that these are accurate, easy to read, clear and unambiguous.

Store signage hierarchy

Store signage and ticketing should make it easy for shoppers to find the products which they seek. These will usually closely follow the store merchandise classification.

ideas
NOW

BE SHOPPER FRIENDLY!

In some industries merchandise classification may be producer rather than consumer based. In pharmacy a classification could be "Plasters" but the consumer may think "Band-aids"; a hardware classification is "Striking tools" but the consumer may think "Hammers".

Good signage is consumer focused so that shoppers can easily find the products which they seek.

Department

Identify location

ELECTRICAL

Category

Identify category within department

Small Appliances

Sub category

TOASTERS

Product shelf label

Communicate product, bar code and price

SUNBEAM 2 SLICE TOASTER
MODEL TA10 **\$22.00**
0 12345 67890 5

Retailers will have their own policies covering signs, tickets and labels, their usage and placement. These will also cover special signs such as 'Winter Sale' for use in windows and store displays.

How signs and other tickets are used depend largely upon their purpose.

- For promotions, major chains, buying groups and franchises issue stores with a kit for each promotion eg 'Mothers' Day'. This will include large signs for windows or to hang in the store, medium signs for gondola ends and smaller signs for each product. These will usually include a product description and the promotion price.
- Shelf labels are usually computer printed and include product descriptions, model numbers, price, product/bar codes. They may also print maximum or minimum stocks for stock control purposes. Australian supermarkets are now integrating 'unit pricing' into their shelf labels to make it easier for shoppers to compare prices eg price per kg or per litre.



ACCURATE SHELF LABELS ARE ESSENTIAL!

Stores which use scanning will not physically ticket the stock so that there must be shelf labels for each product and these should be up to date. Stock fillers should check the labels and ensure that stock is placed in the correct locations.

skills NOW Sample Retail Certificate II V1.3

- Even though most tickets and labels are now printed, most stores still have a need for neatly handwritten tickets such as 'CDS TO CLEAR \$5' for local store needs.

Part of the store routine should be at least weekly, check for soiled, damaged, illegible or incorrect labels/tickets and replace them where necessary.

Where electronic or computer equipment is used to generate tickets, the equipment should be used and maintained according to manufacturer instructions and stored in a secure location.



If there is a store promotion, signs should be used to communicate to visitors that something interesting is happening.

Other signs will be used to communicate the price message and identify reduced items.



Place, arrange and display price tickets and labels

If scanning is used, provided there is a valid product file which is up to date, then there should be no problem in processing a sales transaction. Bar codes do not normally show prices so there may be a problem with price identification. Shoppers need to know the price of the item that they wish to buy. If this is not clearly communicated, then they may not buy at all.

The price communication will usually be by shelf label or a ticket – 'Van Heusen Shirts \$25'. It is essential that these are easy to read and accurate; if not they should be replaced according to store policy. If scanning is used, the shelf label must be up to date.

If adhesive or other price tickets are used, they should be easy to find and read. To prevent ticket switching, tickets should be firmly attached to products – if adhesive, a strong adhesive is required. In the case of apparel, it should be also easy to determine the size.

Where adhesive price tickets are used, for shopper convenience, more attractive displays and efficient sales processing, retailers may have a ticketing protocol such as all price tickets to be located in the top right hand corner.

Maintain displays

Retailers have two types of display:

Display of range products

These displays usually account for the majority of store space – these are semi permanent displays which carry regular range items. Many categories however have seasonal peaks such as Garden and Skin Care in spring or summer. It may be necessary to expand and contract categories to cater for seasonal variations.

Promotional or special event displays

Retailers also display merchandise for special events such as Christmas or Mothers’ Day and will have regular catalogue and other sales such as ‘Back to School’ or ‘Winter Sale’. Displays need to communicate to the events and product offers to customers.



An important retail function is to set up displays and to reset and dismantle displays for example, the aim at Christmas is for stores to have sold out of all Christmas specific merchandise such as Christmas trees and wrap by Christmas eve. If this is achieved, to avoid loss of sales due to empty space, the store should have a plan to replace the Christmas display with other merchandise such as Summer or ‘Back to School’ merchandise. This merchandise selection should have been approved by the supervisor or manager.

Merchandise for new displays should be restocked, arranged and faced up. The display should be maintained in a clean and tidy manner according to store policies. All displays should be checked before opening each day.

Protecting merchandise

At all times, products should be handled, stored, displayed and used according to the nature of the product and any relevant government regulations.

BE CAREFUL WITH STOCK!

This is not the way to handle CDs. Stock is a business asset and should be handled carefully at all times to avoid damage.



Do	Don't
<ul style="list-style-type: none"> • Place products in the correct location according to the store plan or planogram • Remove soiled and damaged stock • Check for near use by date merchandise • Fill from the rear – oldest stock to the front • Display items to front of shelf to give an impression of being well stocked • Accurate and attractive tickets • Accurate shelf labels • Maintain displays so as to be attractive • Store and protect stock according to regulations and store policies 	<ul style="list-style-type: none"> • Reduce display appeal with tired old stock • Sell past use by stock – clear it out • Use old, unattractive , inaccurate tickets and shelf labels

BOOK 2 – ACTIVITIES & ASSESSMENTS

13 SIRXMER001A Merchandise products

skills NOW – LEARNING PLAN

Unit: SIRXMER001A Merchandise products	Related units: SIRXINV002A Maintain and order stock SIRXINV001A Perform stock control procedures SIRXRSK001A Minimise theft	
Step	Start date	Finish date
1. Unit briefing, complete activity plan		
2. Read note and ideas		
3. Complete Retail@work activities		
4. Complete tasks and learning activities for assessment		
5. Complete assessment kit		
6. Assessment process		

PRACTICAL ACTIVITIES					
Activity	Standard	Type	Unit number	EC No.	✓
1. Place and arrange merchandise.	Can you do this with minimal supervision?	On job	SIRXMER001A	1	
2. Product displays.	Have you set up an attractive product display? Can you do this with limited supervision?	On job	SIRXMER001A	1	
3. Display labels and tickets	Can you set up display labels and tickets in the correct locations?	On job	SIRXMER001A	3	
4. Retailer displays	Visit a retailer and select a product display which you find attractive. The reasons why this display appeals to you.	Other	SIRXMER001A	1	
5. Maintain displays	What needs to be done to maintain a product display in a fully stocked position and to ensure that it remains interesting and attractive for customers?	On job	SIRXMER001A	4	

2.01 Retail @ work

Apply your knowledge & skills

CASE 13.01 Effective merchandising

Good product merchandising is important in making displays more interesting, attractive and to improve sales.

Brett’s Hardware is a member of a large retail group which publishes sales statistics for members. Brett learns that for similar stores in the group, Paint and Paint Accessories account for 15% of total sales, but for Brett they are only 11% of sales. Brett thinks that his relatively poor performance is due to the department location at the rear of the store. He aims to improve performance through better location and merchandising. These are issues to consider – what can Brett do to improve Paint and Paint Accessories performance?

Issues	Improvement ideas
Department size	
Department location	
Department signage	
Department layout	
Fixtures & lighting	
Product range	
Product displays	
Staffing	
Promotion space & displays	

A. TASK	B. ACTIVITY	C. RPL

CASE 13.02 Maintain effective display

Displays must be constantly refurbished and updated to maintain standards.

Brett has finalised a plan to upgrade the Paint and Paint Accessories department but realises that if it is to be successful, high presentation standards must be maintained. He has identified these issues – define the performance standards required.

Issues	Performance standards
Cleaning	
Housekeeping	
Stock management	
Displays	
Department reviews	

A. TASK	B. ACTIVITY	C. RPL

RETAIL@WORK ACTIVITY SUMMARY				
13 SIRXMER001A Merchandise products				
Initial when activities completed & checked				
Competed activities	Trainee	Trainer	Employer or 3 rd party	Assessor
13.01 Effective merchandising*				
13.02 Maintain effective displays*				

2.02 Tasks & learning activities

Test your knowledge & skills

Prior to doing this section, trainees should have read and understood #1.02 Notes and Ideas and # 2.01 Retail@work.

These tasks and questions specifically match unit elements of competency and performance criteria. Trainees should complete each task for each selected unit. Trainer, assessor or other relevant parties to initial the boxes when each is satisfactorily completed. If space provided is insufficient attach additional sheets.

Trainees are to provide reasons for each answer.

All tasks and activities should comply with organisation policies and procedures and any relevant government regulations.

1. Place and arrange merchandise

Bruce has been given the task of filling displays after orders have been received and processed.

1.01 Unpack merchandise according to store policy and procedures and legislative requirements

a) Why is it important for the store to have policies and procedures concerning unpacking goods received?

b) Which goods handling practices should be followed?

A. TASK	B. ACTIVITY	C. RPL

1.02 Place merchandise on floor, fixtures and shelves in determined locations according to OHS and other relevant legislative requirements

Why is it important for the store to have a display plan or planogram to specify merchandise location?

A. TASK	B. ACTIVITY	C. RPL

1.03 Display merchandise to achieve a balanced, fully-stocked appearance and promote sales

How can Bruce display the merchandise so that it gives a fully stocked appearance?

A. TASK	B. ACTIVITY	C. RPL

1.04 Identify damaged, soiled or out-of-date stock and take corrective action as required according to store procedure

When filling the displays, Bruce finds several items which are soiled, damaged or past use by dates. What should he do?

A. TASK	B. ACTIVITY	C. RPL

1.05 Place stock range to conform with fixtures, ticketing, prices or bar codes

How can Bruce use signs, tickets and shelf labels to ensure that stock is placed in the correct locations?

A. TASK	B. ACTIVITY	C. RPL

1.06 Rotate stock according to stock requirements and store procedure

a) When new stock is received, why should it be placed to the rear of the display?

b) When filling the milk display, Bruce finds that several bottles are near their use by date. What should he do?

A. TASK	B. ACTIVITY	C. RPL

1.07 Ensure stock presentation conforms to special handling techniques and other safety requirements

After Bruce has completed the fill, it should be checked by his supervisor Melanie – what should she look for?

A. TASK	B. ACTIVITY	C. RPL

2. Prepare display labels and tickets

2.01 Prepare labels and tickets for window, wall or floor displays according to store policy

Prepare tickets using electronic equipment or neatly by hand according to store procedures

Most retailers will use different signs and tickets according to location and need. Describe suitable signs which could be used.

Purpose/Location	Sign or ticket type
Department identification such as "Children's Shoes"	
Hanging sign such as "Winter Sale"	
Promotional end or cap such as: "Kettle \$10"	
Product label showing product, bar code and price	

A. TASK	B. ACTIVITY	C. RPL

2.02 Identify soiled, damaged, illegible or incorrect labels and tickets and take corrective action

When setting up the displays, Bruce finds that several tickets are soiled, damaged or out of date. What should he do?

A. TASK	B. ACTIVITY	C. RPL

2.03 Use and maintain electronic ticketing and labelling equipment according to design specifications

Store ticketing equipment in a secure location

These are important where manual ticketing and adhesive prices tickets are used. As most outlets now use computer scanning, it is important that this equipment is maintained in good condition and that product files are up to date.

Bruce finds that price labelling equipment is not working. What should he do?

A. TASK	B. ACTIVITY	C. RPL

3. Place, arrange and display price labels and tickets

3.01 Place labels and tickets visibly and correctly on merchandise

Replace labels and tickets according to store policy

Natasha works in Susie's Boutique. She notices that several shirts recently ordered have no swing tickets which contain bar codes, price and size data. What should she do?

A. TASK	B. ACTIVITY	C. RPL

3.02 Maintain correct pricing and information on merchandise according to store procedures, industry codes of practice and legislative requirements

Susie's Boutique sells hair care products from a shelf display. Each product has a shelf label for product and price information. Elseve products have just increased by 5% so that Susie's retail price should increase to retain its margin. What should Natasha do?

A. TASK	B. ACTIVITY	C. RPL

4. Maintain displays

Bob's Electrical has a Heating and Cooling department. At the end of Winter, the range of heaters is reduced to just two or three portable electric heaters. These are replaced with electric fans and portable coolers.

4.01 Reset and dismantle unsuitable or out of date displays and special promotion areas as directed

Assist supervisor in selection of merchandise for display

Mike is in charge of Heating and Cooling and Chloe is a team member. What tasks are involved in changing the display?

A. TASK	B. ACTIVITY	C. RPL

4.02 Identify, reset or remove unsuitable or out-of-date displays as directed

Chloe identifies stocks of three products which are not part of the new range. What should she do?

A. TASK	B. ACTIVITY	C. RPL

4.03 Identify optimum stock levels and replenish stock according to store policy

Chloe thinks that the new summer range may not fit in the space allocated. What can she do to make the range fit?

A. TASK	B. ACTIVITY	C. RPL

4.04 Arrange and face up merchandise as directed and according to layout specifications and load-bearing capacity of fixtures

Chloe arranges the display but the Wonderworld cooler is too large and heavy for the fixtures – what should she do?

A. TASK	B. ACTIVITY	C. RPL

4.05 Maintain display areas in a clean and tidy condition

Remove excess packaging from display areas

How can Mike ensure that the Cooling display is maintained in a neat and tidy condition?

A. TASK	B. ACTIVITY	C. RPL

5. Protect merchandise

5.01 Identify and apply correct handling, storage and display techniques according to stock characteristics and legislative requirements

Nelson is in charge of the delicatessen display at Modern Supermarket. How can he ensure that the display is attractive and that food is handled and stored so as to minimise waste?

A. TASK	B. ACTIVITY	C. RPL

Practical activities completed

If you have completed other practical activities relevant to this unit of competency then enter details here. You may be required to provide evidence or witness statements regarding the activity.

UNIT OF COMPETENCY SUMMARY				
13 SIRXMER001A Merchandise products				
Initial when activities completed & checked				
Element of competency	Trainee	Trainer	Employer or 3rd party	Assessor
1. Place and arrange merchandise				
2. Prepare display labels and tickets				
3. Place & display price labels & tickets				
4. Maintain displays				
5. Protect merchandise				
Other practical activities				

2.03 Assessment kit

Your record for assessment

This kit is to be completed by the trainee prior to assessment . All completed activities to be evidenced as required and initialled by relevant parties.

A COMPLETED ACTIVITIES			
ACTIVITY	TRAINEE	TRAINER	ASSESSOR
Read or complete 1.01 Learning outcomes			
Read 1.02 Notes and ideas			
Complete 2.01 Retail@work activities as determined by trainer			
Complete 2.02 Tasks and learning activities			

B OTHER PRACTICAL ACTIVITIES

Trainees to list or describe other completed relevant activities for this unit of competency. As evidence of your accomplishment, employers or third parties should provide witness statements which verify that you have completed the activity to the required standard.

Trainee activity	Witness statement		
Witness name	Witness position	Date	Contact no.

Trainee activity		Witness statement	
Witness name	Witness position	Date	Contact no.

Trainee activity		Witness statement	
Witness name	Witness position	Date	Contact no.

C RECOGNITION OF PRIOR LEARNING (RPL)

If you have previous training or experience in this area which you wish to be recognised for this unit of competency (RPL) then you need to provide verifiable evidence such as copies of the qualification achieved or employment information.

Qualification or activity	Trainer/Employer	Date	Contact details

D EMPLOYABILITY SKILLS

Vocational training aims to provide employability skills for better employment prospects or to enhance trainee career paths. Initial the skills which you think you may have learned from this unit and describe how they may benefit you.

Employability skill	✓	Employability skill	✓
1 Communicating effectively		5 Planning and organising	
2 Working in a team		6 Self management	
3 Problem solving		7 Learning new skills	
4 Initiative & enterprise		8 Using technology	
Personal benefits			

E TRAINEE ASSESSMENT RECORD

Based on the completed activities, evidence provided, third party witness and employer observation statements, this trainee has been assessed as competent in this unit of competency.

Trainee: Date:

Trainer: Date:

Assessor: Date:

Unit	SIRXMER001A Merchandise products	
Trainee Name		
Trainee Number		C

TRAINER GUIDE – SELECTED EXAMPLES

13 SIRXMER001A Merchandise products

2.01 Retail @ work

Apply your knowledge & skills

CASE 13.01 Effective merchandising

Good product merchandising is important in making displays more interesting, attractive and to improve sales.

Brett's Hardware is a member of a large retail group which publishes sales statistics for members. Brett learns that for similar stores in the group, Paint and Paint Accessories account for 15% of total sales, but for Brett they are only 11% of sales. Brett thinks that his relatively poor performance is due to the department location at the rear of the store. He aims to improve performance through better location and merchandising. These are issues to consider – what can Brett do to improve Paint and Paint Accessories performance?

Issues	Improvement ideas
Department size	<i>Check that department is large enough to achieve sales potential.</i>
Department location	<i>Is the department in the best location?</i>
Department signage	<i>Can shoppers identify the department?</i>
Department layout	<i>Is the layout logical – products easy to find?</i>
Fixtures & lighting	<i>Is it bright and attractive? Easy to select colours?</i>
Product range	<i>Does the product range cater for shopper needs?</i>
Product displays	<i>Are the displays accurate and appealing?</i>
Staffing	<i>Is the department adequately staffed? Are there sufficient staff and do they have the required skills?</i>
Promotion space & displays	<i>Are promotions well managed with attractive displays?</i>

CASE 13.02 Maintain effective display

Displays must be constantly refurbished and updated to maintain standards.

Issues	Performance standards
Cleaning	<i>Clean department daily – wipe any paint spills as they occur.</i>
Housekeeping	<i>Surplus or damaged stock to be promptly removed.</i>
Stock management	<i>Check for out of stocks and order weekly. Identify key items and check these daily.</i>
Displays	<i>Displays to be neat, well kept and attractive.</i>
Department reviews	<i>Review department performance weekly and monthly.</i>

2.02 Tasks & learning activities

Test your knowledge & skills

1. Place and arrange merchandise

Bruce has been given the task of filling displays after orders have been received and processed.

1.01 Unpack merchandise according to store policy and procedures and legislative requirements

a) Why is it important for the store to have policies and procedures concerning unpacking goods received?

Covered in unit Perform stock control procedures

b) Which goods handling practices should be followed?

Covered in unit Perform stock control procedures

1.02 Place merchandise on floor, fixtures and shelves in determined locations according to OHS and other relevant legislative requirements

Why is it important for the store to have a display plan or planogram to specify merchandise location?

To ensure that stock is placed in the correct location.

1.03 Display merchandise to achieve a balanced, fully-stocked appearance and promote sales

How can Bruce display the merchandise so that it gives a fully stocked appearance?

Display to the front of shelves and hooks

1.04 Identify damaged, soiled or out-of-date stock and take corrective action as required according to store procedure

When filling the displays, Bruce finds several items which are soiled, damaged or past use by dates. What should he do?

Discuss with supervisor but in principle, the stock should be removed and disposed of according to store policies and procedures. These should be charged against the relevant department so that such costs can be better monitored and controlled.

1.05 Place stock range to conform with fixtures, ticketing, prices or bar codes

How can Bruce use signs, tickets and shelf labels to ensure that stock is placed in the correct locations?

Match products with tickets and shelf labels – important to communicate price to shoppers if stock is bar coded not priced.

1.06 Rotate stock according to stock requirements and store procedure

a) When new stock is received, why should it be placed to the rear of the display?

To rotate stock by selling the oldest stock first.

b) When filling the milk display, Bruce finds that several bottles are near their use by date. What should he do?

Re-arrange by date to display the oldest to the front. Perhaps remove the newest stock from the display until the older stock is sold. A price reduction may be needed to clear near use by date stock. Check stock daily for better stock control.

4.01 Reset and dismantle special promotion area

Assist supervisor in selection of merchandise for display

Mike is in charge of Heating and Cooling and Chloe is a team member. What tasks are involved in changing the display?

Remove the heaters which are not to be carried in the Summer season – this may involve markdown and clearance action to create space. This space is to be used for cooling products.

4.02 Identify, reset or remove unsuitable or out-of-date displays as directed

Chloe identifies stocks of three products which are not part of the new range. What should she do?

Ask Mike what to do with them – clearance action?

4.03 Identify optimum stock levels and replenish stock according to store policy

Chloe thinks that the new summer range may not fit in the space allocated. What can she do to make the range fit?

Review department space and product space allocation. Is the new range too large?

4.04 Arrange and face up merchandise as directed and according to layout specifications and load-bearing capacity of fixtures

Chloe arranges the display but the Wonderworld cooler is too large and heavy for the fixtures – what should she do?

Display it on the floor – this may create space on the fixtures which may be used for smaller items.

4.05 Maintain display areas in a clean and tidy condition

Remove excess packaging from display areas

How can Mike ensure that the Cooling display is maintained in a neat and tidy condition?

Check daily and clean and review packaging and rubbish as necessary.

5.01 Identify and apply correct handling, storage and display techniques according to stock characteristics and legislative requirements

Nelson is in charge of the delicatessen display at Modern Supermarket. How can he ensure that the display is attractive and that food is handled and stored so as to minimise waste?

Ensure that stock displayed is attractive, fresh and rotated so that the oldest stock is sold first.

Practical activities completed

If you have completed other practical activities relevant to this unit of competency then enter details here. You may be required to provide evidence or witness statements regarding the activity.

TRAINER/ASSESSOR GUIDE	SIRXMER001A Merchandise products
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1. Unit competence standard

To be assessed as competent in this unit trainees must demonstrate that they know how to handle merchandise within a retail store including the arrangement and presentation of merchandise, setting up and maintaining displays and the labelling and pricing of stock.

2. Evidence and validation

Prior to assessment the trainee should have completed **2.03 Assessment kit** for this unit and submit it together with **2.02 Tasks and activities** and evidence of completed activities, qualifications and experience.

3. Assessment moderation

'Assessment moderation' is used to ensure the integrity of the unit qualification by ensuring that trainees have the knowledge and skills to consistently perform relevant tasks in the workplace at a high standard. An effective method is to ask the trainee questions about the unit, their completed work and other issues.

a) 2.01 Retail@work and 2.02 Tasks and activities

These cover unit elements of competency and performance criteria. Trainer/Assessor to review with trainee to confirm knowledge and skills.

b) Supplementary questions

Trainer/Assessor to ask supplementary questions to verify trainee knowledge and skills.

4. Supplementary questions

Question	Suggested response
Why should products be located so that shoppers can find them easily?	Many sales are made on a self-selection basis so it should be easy for shoppers to find the products which they seek,
Why should displays be attractive?	They should be interesting and appealing to attract shopper attention and interest.
Why should signs, tickets and labels be attractive, legible and in good condition?	To make it easier for shoppers to identify the merchandise, learn the features and the price.
Why should displays be well maintained?	To maintain a high standard of presentation for all store displays.
Why should displays protect the stock from damage, such as accidental breakage?	To minimise soiled and damaged markdowns, which can be a significant business expense.

5. Assessment

Rate trainee as C or NYC for the unit and sign off according your policies and procedures