

skills NOW SIR07 RETAIL TRAINING KITS

This sample

All skills now training packages follow a common format which emphasises the development of trainee skills by doing practical activities. This is a composite sample with extracts from different units at different levels to provide an indication of material available.

skills NOW objectives

skills NOW's objectives are to provide training resources which are up-to-date, relevant, interesting and easy to use. The simple to book format means that this training material is very cost-effective and can greatly improve participant productivity

skills NOW kit formats

All skills now material is in a two book kit format. These provide sufficient units to meet the SIR07 qualifications specifications. Elective units have been selected on the basis of utility – those which are most likely to be useful in the workplace. It is recommended that both books are used, but each is available separately if required. A Trainer Guide is also available.

Book 1: Notes & ideas

This is a resource book to provide trainees with information about each unit in the course. The book is in two parts:

1.01 Learning outcomes *Knowledge & skills for this unit*

This is an introduction for each unit which can be used by trainers to brief trainees. It closely follows the unit Elements of competency (ECs) and Performance criteria (PCs) for the unit but expressed in simple language.

1.02 Notes & ideas *Read & learn about the topics*

These are notes about each unit. They cover the required unit ECs and PCs but also provide additional material to make the unit more up to date, practical and relevant eg. how units on merchandise presentation will also include information on planograms which are commonly used by most retailers but are not included in the formal units.

Additional information is also supplied to improve the quality of the course so that it is not just a collection of individual units. For Certificate II there is an Introduction to retail unit to serve as a framework to support other units. Certificate III and above includes a Glossary of Retail Terms to cover issues likely to be faced when employed in retail.

skills NOW recommends that trainees retain their copies of Book 1 as it will be a useful, practical reference if employed in retailing.

Book 2: Activities & assessment

These are trainee workbooks – trainees complete practical learning and assessment activities so that they are ready for assessment. Pagination means that each section can be easily removed and retained by the trainer as evidence of achievement.

2.01 Retail @ work *Apply your knowledge & skills*

These practical learning activities are called “Cases” and can be used in class or as trainee assignments. These are essentially a Trainer resource – the trainer selects the most appropriate cases for the use. Most of these are relevant to unit ECs and PCs.

2.01 Tasks & learning activities *Test your knowledge & skills*

These activities are a fully integrated assessment tool for each unit. The ECs and PCs are taken verbatim from the SIRO7 unit specifications (even if the wording in some cases is ponderous). Trainees answer questions to test their knowledge and skills in writing or orally. The kits therefore have inbuilt “moderation” features to ensure that all trainees are uniformly assessed.

The aim is for the trainee to present completed work for assessment

2.03 Assessment kit *Your record for assessment*

skills NOW sees self organisation as an important part of the learning process. Trainees should thus complete this kit for each unit prior to assessment and present the required evidence including 2.01.

The trainee or assessor should decide which parts of Book 2 should be retained as evidence.

The following pages are representative samples from a cross-section of units covering Retail Certificates II to IV.

COMMENTS

Comments are shown in shaded callouts.

5 SIRXCLM001A Organise and maintain work areas

SIRXCLM001A Organise and maintain work areas is a core unit for Retail and Community Pharmacy Certificates Level II.

1.01 Learning outcomes *Knowledge & skills for this unit*

This unit shows how to improve store presentation and shopper appeal through applying high standards of cleanliness and housekeeping in the outlet.

Whilst this unit is primarily for new entrants in retail, wholesale and community pharmacy, all staff should ensure that store work and trading areas are maintained in a clean and tidy state so that the outlet is a more attractive shopping destination.

As a clean, pleasant shopping environment is a critical component of the total retailer shopper offer, retail employers seek staff who can maintain high standards of store presentation.

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

Knowledge

The importance of maintaining store areas and equipment in an uncluttered and organised manner for efficiency, convenience and safety.

The importance of a safe, clean and attractive shopping environment.

Important skills

You need to be able to:

- Maintain counters, preparation areas, point of sales areas, and walkways in a safe, uncluttered and organised state
- Ensure that cleaning functions are safely, effectively and efficiently carried out with minimum inconvenience to shoppers and staff
- Ensure that store procedures and schedules for cleaning and tidying are followed

You need to ensure that:

- Store and personal hygiene and safety standards are practiced
- Store areas are cleaned according to schedule
- Store policies for cleaning and removal of spills, food, waste, or other potential hazards are followed and that waste materials are safely disposed of
- Warning signs are used to alert shoppers and staff of potential hazards such as spills and affected areas are cordoned off
- Store equipment and supplies are to be safely stored after use
- You know how to properly use, clean and maintain tools and equipment

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.

7 SIRXMER002A Coordinate merchandise presentation

SIRXMER002A Coordinate merchandise presentation is an elective unit for Certificate III in Retail and Wholesale.

1.02 Notes & ideas

Read & learn about the topics

Coordinating merchandise presentation and display

To achieve their full potential, it is important that retailers maintain high presentation and display standards. This is particularly important in the case of promotions as retail groups go to much trouble and expense to plan them. Their efforts should not be wasted by poor store level promotion displays and out of stocks. Promotions may attract new store visitors, so it is important to create a favourable impression so that they may become regular customers.

ideas
NOW

DON'T LET THE TEAM DOWN!
Make sure that your store is attractive & shopper friendly – neat, tidy, good signage and ticketing so that products are easy to find & the shopper can easily make a buying decision.

For a typical promotion, your group will provide each store with:

- Promotion dates – start & finish dates
- Promotion theme – eg “Winter Sale”, “Santa Specials”
- A list of items for promotion and promotion sell prices
- Details of featured products
- A sales kit with promotion signage and tickets to be used

Captions such as this are used in conjunction with “ideas NOW” or pictures to reinforce key issues.

Merchandise presentation steps

1. THE OUTLET SHOULD BE IDENTIFIABLE
Use clear signage for easy identification. If using a catalogue, a location map may help shoppers.



2. COMMUNICATE THAT SOMETHING IS HAPPENING
Use signs, posters and window displays communicate that something interesting is happening in your outlet to attract passers-by and shoppers. These can be augmented with special displays, balloons, giveaways and spruiker's.



3. ENTICE PASSERS-BY OR SHOPPERS INTO THE STORE

Ensure that entry points are obstacle free and that shoppers have a good view of the store. A warm welcome, attractive displays, interesting merchandise and specials near the entry point will arouse interest and encourage shopper entry. The store should have good departmental signage so that it is easy for shoppers to find products of interest. Friendly, helpful staff should provide excellent advice and service.



4. PROMOTION SET UP

The store should convey the promotion message and be set up to feature and sell the advertised products. Signs and tickets should be used for displays of promoted products.



Retail promotions will usually have a theme and title which will be used in posters and signs throughout the store for the period of the promotion. These are often hung from the ceiling or displayed on columns or walls. In addition to these there will usually be smaller tickets to be used to identify promoted items.

Stores may also use general “Sale” tickets to identify items with reduced prices – these may not necessarily be products included in the promotion.



AVOID VISUAL POLLUTION!

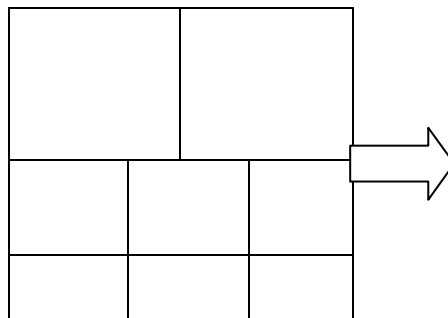
A key aim of any retail promotion is to generate develop repeat business by offering excellent products and service in a pleasant shopping environment. If however there are too many large, ugly signs, these will detract from the shopping experience and many shoppers may find these unattractive and not return.



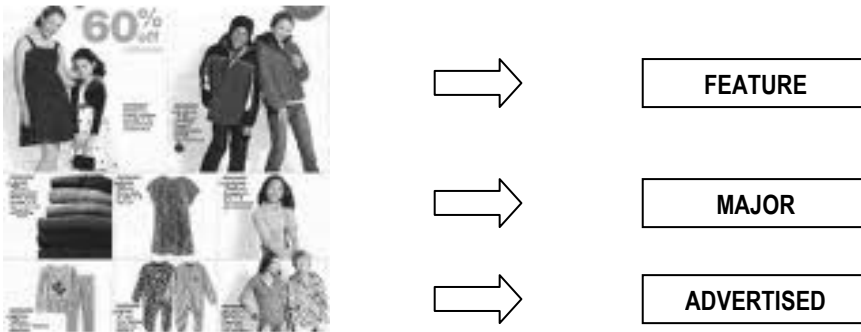
5. DISPLAYS AND MERCHANDISING

These will largely be determined by the nature of the promotion and products advertised. The products featured in store should be those which are prominent in the promotion as these are most likely to be sought.

A retailer promotion begins with a plan which shows products selected and their relative emphasis. When setting up a promotion, then the retailer should display and ticket these according to the plan.



The advertisement largely determines the store display and ticketing for the promotion period:



Product display and ticketing

This will depend largely upon outlet size. These examples are for larger stores – smaller outlets may need to scale these down depending upon their size. Product location and display will also depend on the physical size of the item and relevant sales volumes eg. small items such as vitamin tablets will normally be promoted from their own location but bulkier items such as baby napkins may need additional space for the promotion.

1. Feature displays

These could be on a gondola end, a block display within a gondola or a free standing or supplier unit – they should have a prominent sign to indicate that they are advertised or represent exceptional value. These may be in a different location from normal – if so, they should also be displayed in their normal place as regular shoppers may look there first.



2. Major displays

These may be allocated additional space for the promotion – it could be at their normal location or possibly on a part end display.



3. Promoted or advertised products

These products are advertised but are not expected to generate major sales increases. These will usually be promoted at or near their normal stock location. The aim is to communicate that they are part of the promotion and communicate any price savings. This may be done through small shelf or other labels.



Ticketing

In any promotion it is critical that display and price tickets are correct. In a computerised retail system the product files will be amended to new prices for the period of the promotion. All ticketed prices and shelf labels should be checked prior to the promotion to ensure that they agree with the advertised prices.

It is also important to check that the new tickets are placed with the correct merchandise. This is important in categories such as electronics in which there may be several models of DVD player of the same brand. Tickets should show model numbers and if possible product features and benefits to help shoppers choose between different models.



The store should have a process to revert to the previous pricing on completion of the promotion.

Signage and product locations

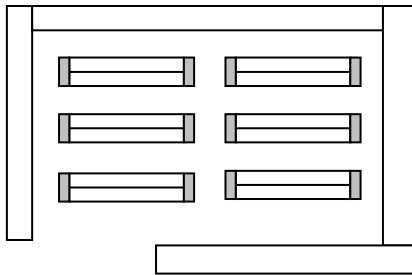


In larger stores, good signage is essential to help new store visitors and shoppers find the departments, categories and products which they seek.

When determining advertised product locations, try to place these within or near their department as this improves the chance of selling related products.

In most stores the majority of space will be allocated for display of standard range products so that space available for promotional displays is limited. A common layout is like this:

STORE LAYOUT



Range displays 

Promotional displays 

In this case the promotional space is restricted to the gondola ends. Some larger stores may have special areas for promotional merchandise.

GONDOLA
Range merchandise



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

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

Prior to the promotion it must be determined which products are to be promoted from their normal locations and suitable tickets arranged. As store layout map should be used to mark the planned locations of major and feature items to ensure that all are in suitable positions. Special tickets should be arranged for feature and major lines.

6. PROMOTION STOCKS AND STORE DISPLAY

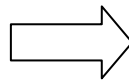
Before a promotion the outlet should look its best . Ensure that it is fully stocked with promoted lines, that displays are attractive and are well stocked.

Before the promotion check that:

1. All stock for the promotion has been ordered and received. If not, take corrective action.
2. Review displays and ticketing of promoted items and ensure that the store is clean, attractive and well stocked.



3. Check stocks of related products which may be purchased in conjunction with advertised lines as these could be add-on sales eg. if paint is advertised also ensure that you are well stocked in paint accessories.



7. PROMOTION – STAFF BRIEFING

Before a promotion sales staff should be fully briefed on the promotion, it's timing and objectives. Staff should know which products are to be promoted and if more stock can be ordered if necessary. Staff should have sufficient product knowledge so that they know product features and benefits and can give shoppers good advice.



TABLE 1.01 Promotion presentation setup

Action	Comment
1. Stock support - promoted items	Estimate promotion sales and order stocks to cover these plus closing stocks to avoid post promotion out of stocks.
2. Stock support non promoted items	The promotion will generate store traffic and sales of non promoted items. The store should be well stocked. Check stocks of related items eg if paint is to be promoted, then you should be well stocked in accessories such as brushes and rollers.
3. Product location	Decide which items are to be sold from their regular locations and which will be sold from promotional space. Use map of your store determine product location and display methods such as tables, floor displays and gondola ends. Plan locations to maximise sales of related items.
4. Signage & displays	Locate signs in terms of product and shopper traffic flow – easy for shoppers to read and locate promoted items. Signage to be accurate and appropriate for the merchandise – make it easy for shoppers to find promoted items. All price tickets and shelf labels to be checked prior to the promotions.
5. Post promotion layout	When the promotion ends, you need to switch to a new layout – this is critical for special event products such as Christmas merchandise which should be replayed with regular products for post Christmas sales.
6. Displays and set up	If required, special displays should be planned to achieve visual impact. These should be constructed and maintained in a safe, secure manner. Staff to be informed of display standards and maintenance Displays to be completed as scheduled, with minimum disruption to customer service and traffic flow. The store should be set up for the promotion and inspected prior to the commencement time.
7. Staff & promotions	Staff play a critical role in the success of promotions. Make sure that they: <ul style="list-style-type: none"> • Are enthusiastic about the proportion • Have specific tasks and know what to do • Know the products to be promoted and can advise customers • Know product pricing for the promotion • Provide excellent service • Know to maintain attractive well filled displays Staff to be informed of plans for dismantling and disposal of displays.
8. Finalise promotion	Plan to revert to regular displays and pricing – replace promotional displays.
9. Promotion review	Staff meeting to review promotion results and identify ways to improve future promotions – make suggestions to management

Implementing merchandise pricing

Product pricing is normally a retailer decision. For promotions such as catalogues, the promotion prices are normally set centrally by the group.

The retailer will normally have its own policies and procedures for pricing and ticketing, but in the case of a group promotion, stores will usually be issued with tickets such as *'SPRING SALE'* which should be used.

If there are price changes, these should be made according to store policy and communicated to relevant staff.

For promotions involving price reductions, the usual process is:

Regular price	\$3.00
Promotion price	\$2.00

Promotion start April 1st

Promotion end April 14th

The promotion price applies for the designated period, and then reverts to the regular price. Most computer point of sale systems have inbuilt calendars which will perform this change – scanners will charge the promotion price automatically for the period and then revert to the regular price.

Do	Don't
<ul style="list-style-type: none"> • Ensure that item promotions are planned in detail – item, price, stock display • Plan displays to provide greatest visual impact • Ensure that store displays are shopper friendly • Involve all staff in promotion activities • Ensure that staff know the display standards and maintain them • Ensure that stocks and displays are replenished during the promotion period • Erect and dismantle special displays according to the promotion schedule • Ensure that pricing is accurate and current • Ensure that tickets are in the correct locations • Replace any soiled or damaged tickets • Review promotion results to identify improvement opportunities 	<ul style="list-style-type: none"> • Accept sub standard displays – maintain a high standard at all times • Run out of stock – keep displays well stocked for the promotion • Be indifferent – good promotions require positive staff involvement

DO'S and DON'TS are used to reinforce key unit issues.

2 SIRXOHS003A Provide a safe working environment

skills NOW – LEARNING PLAN

Unit: SIRXOHS003A Provide a safe working environment	Related units:	
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		

2.01 Retail @ work

Apply your knowledge & skills

LEARNING PLAN for each unit to be developed by trainer and trainee to ensure training deadlines are met.

CASE 2.01 OHS staff review meeting

For a safe workplace it is important that all staff are vigilant and safety conscious, but to achieve this, they should be constantly reminded of safety issues. Regular staff meetings can be used to reinforce key OHS issues.

This is an agenda for an OHS staff meeting. Describe the issues which could be covered.

OHS AGENDA

Item	Description
Safety incidents since last meeting	
Incident reports	
New equipment, safety news	
Review of hazards	
Equipment issues	
Safety training	
Emergency plans	
Evacuation plan & drill	
Store inspection & report	

Trainer to select which activities are to be completed and whether they are to be done in class or as individual exercises. Trainees can write their answers in the spaces provided.

This panel can be used for assessment purposes. It indicates whether the trainee has: A Completed this task; B Has learned by doing other activities or C Has prior learning for which they seek credit.

A. TASK	B. ACTIVITY	C. RPL

CASE 2.02 OHS communications

List ways by which you can keep staff informed of OHS issues within your workplace.

- 1.
- 2.
- 3.
- 4.
- 5.

A. TASK	B. ACTIVITY	C. RPL

CASE 2.03 Workplace risk inspection

You should aim to improve your observation skills so that you can easily identify hazards or potential safety risks. For this, visit three retailers (including your own if applicable) and note any potential risks found.

Store	Name & location
Store 1	Your store or another
Store 2	
Store 3	

Potential safety risk	Store 1	Store 2	Store 3
Entry point – steps, mats			
Entry point - clutter			
Floor surfaces – concealed trip hazards			
Aisles – clutter			
Cleanliness, tidiness			
Exits - clutter			
Fixtures – sharp edges, condition			
Dangerous products - sharp, weight			
Hazardous products – chemicals			
Product locations – too high or low			
Other			

A. TASK	B. ACTIVITY	C. RPL

7 SIRXINV003A Plan inventory levels

2.01 Tasks & learning activities

Test your knowledge & skills

1 Forecast inventory demands

Identify links between enterprise planning, sales forecasts and stock levels.
 What is the link between sales and stock levels?

ELEMENTS OF COMPETENCY are shown in the shaded panels.

Determine means to forecast demands on inventory.
 How can sales plans help forecast stock needs?

PERFORMANCE CRITERIA are shown in dark *italic type*

Establish importance of monitoring market trends and technology changes as part of managing inventory demands.
 How can technology and systems are used in the ordering process?

Anticipate impact of special events on future inventory demands.
 Products such as sunglasses and suntan lotions increase significantly in some periods. How would you allow for the seasonal peaks when forecasting stock needs?

Trainees can answer the questions in the space provided or orally. The check panel can be used for each EC.

A. TASK	B. ACTIVITY	C. RPL

2 Implement inventory control systems

Identify and describe the role of inventory control systems in inventory management.
 What is meant by a replenishment stock control system?

Establish operational performance standards or benchmarks to measure and control inventory levels.

How are stock levels set in a replenishment ordering system?

Manage scheduling to assist logistics planning and control inventory levels.

Why should retailers have a stock ordering cycle?

Why is the supplier delivery lead time important in determining inventory levels?

Establish and manage relationship between distribution systems and inventory control.

Distributor A delivers stock within 48 hours of order. Distributor B delivers stock within 7 days of order. How does this difference affect the minimum and maximum stock levels for the retailer?

Compare and contrast different approaches to the management and control of inventory levels to achieve specific operational outcomes.

Retailer A sometimes has cash flow problems and likes to keep stock levels to a minimum. Retailer B does not have these problems and likes to carry more stock to avoid a sales loss due to out of stocks. How would these different approaches affect stock levels?

Adopt operations management approaches to achieve wholesale business and inventory plans, including the use of material resource planning, manufacturing requirements planning and just in time.

Why is it preferable not to carry excess stock?

Devise maintenance plans or processes for inventory equipment, tools and facilities.

Why should inventory equipment such as shop fittings, trolleys and moving equipment be well maintained?

Establish purchasing systems.

What are the benefits of a disciplined ordering system?

Ensure inventory supply arrangements meet demand.

Why is it important that stock quantities are adequate to meet customer demands?

A. TASK	B. ACTIVITY	C. RPL

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.

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	SIRXINV003A Plan inventory levels	
Trainee Name		
Trainee Number		C

SIR07 skills NOW Retail Kits – Content List 2011

SIR20207 Certificate II in Retail

SIR30207 Certificate III in Retail

SNR001	Getting started in retail	BSBCM302A	Organise personal work priorities
SIRXIND001A	Work effectively in a retail environment	SIRXQUA001A	Develop innovative ideas at work
SIRXCOM001A	Communicate in the workplace	SIRXMPR001A	Profile a retail market
SIRXOHS001A	Apply safe working practices	SIRXCCS003A	Coordinate interaction with customers
SIRXCLM001A	Organise and maintain work areas	SIRXMPR008A	Implement advertising & promotion activities
SIRXCCS002A	Interact with customers	SIRRRPK014A	Recommend specialized products & services
SIRXSLS001A	Sell products and services	SIRXMER002A	Coordinate merchandise presentation
SIRXSLS002A	Advise on products & services	SIRXSL003A	Coordinate sales performance
SIRXICT001A	Operate retail technology	BSBFRA301A	Work within a franchise
SIRXCCS001A	Apply point of sale handling procedures	SIRXOHS002A	Maintain store safety
SIRXFIN001A	Balance a point of sale terminal	SIRXRSK002A	Maintain store security
SIRXINV001A	Perform stock control procedures		Glossary of Retail Terms
SIRXMER001A	Merchandise products		
SIRXINV002A	Maintain and order stock		
SIRXRSK001A	Minimise theft		
SIRRFSA001A	Apply food safety practices		
14 units plus Introduction (14 required)		11 units plus Glossary (10 required)*	
		* additional unit provided to add value to the package – trainer can omit one elective unit.	

SIR40207 Certificate IV in Retail Management

SIR50107 Diploma of Retail Management

SIRXMG003A	Lead and manage people	BSBMGT401A	Show leadership in the workplace
SIRXMER004A	Manage merchandise & store presentation	BSBWOR401A	Establish effective workplace relationships
SIRXOHS003A	Provide a safe working environment	BSBADM502B	Manage meetings
BSBMKG413A	Promote products & services	SIRXGLC002A	Legal and legislative compliance
SIRXINV004A	Buy merchandise	SIRXMG005A	Set strategic plans
SIRXINV007A	Plan inventory levels	SIRXPRO007A	Improve supply and distribution chains
SIRXFIN004A	Manage financial resources	SIRXINV006A	Develop purchasing strategies
BSBSBM404B	Undertake business planning	SIRXFIN006A	Manage prices
SIRXSLS005A	Manage sales and service delivery	SIRXINV005A	Control inventory
SIRXCCM002A	Manage store facilities	SIRXFIN005A	Manage operations to budget
	Glossary of Retail Terms		Glossary of Retail Terms
10 units plus Glossary (10 required)		10 units plus Glossary (9 required) * as above	

Pricing and ordering

All prices include GST. A shipping fee of \$5 to \$12 is charged for small orders to cover costs. For larger orders contact us directly to reduce costs and arrange any specific needs such as using your own logo.

	A Book 1 Notes	B Book 2 Activities	C 2 Book Kit A + B	D Trainer Guide*
Certificate II in Retail	SNR2-1 \$40	SNR2-2 \$45	SNR2-3K \$85	SNR2TG \$25
Certificate III in Retail	SNR3-1 \$35	SNR3-2 \$40	SNR3-3K \$75	SNR2TG \$25
Certificate IV in Retail Mgt	SNR4-1 \$35	SNR4-2 \$40	SNR4-3K \$75	SNR4TG \$25
Diploma in Retail	SNRD-1 \$35	SNRD-2 \$40	SNRD-3K \$75	SNRDTG \$25

* no charge if accompanied by reasonable class order. To order send details to peter@skillsnow.com.au or visit website www.skillsnow.com.au to download price list and order form for other skills NOW packages.