

How to use this book

skills NOW follows two learning principles – “learn by doing” – the best way to learn is by doing practical learning activities; and ‘retail is detail’ – to be successful in retail, you need to be able to do many tasks well.

This book covers the nine core units for SIR20207 Certificate II in Retail. is an activity based program in which you learn by doing practical learning activities which are mapped to the skills and knowledge required for accreditation in each unit. In addition to the nine core units for the course, to gain the qualification, a further five ‘elective’ units must be completed. Your trainer will nominate these.

Two supplementary units are also included – “Retail Fundamentals” is an introduction to retail to put the individual units in an industry context and “What makes a successful retailer” which is a motivational unit providing performance improvement ideas. As these are not part of the formal course they need not be assessed and their use is at trainer discretion.

The book is in two parts which include the skills NOW “5 Steps”.

PART 1: LEARNING ACTIVITIES

This consists of four steps which can be done in sequence although if employed in retail, many of the practical learning activities will be done according to store routines.:

STEP 1	Skills & Knowledge
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Trainer briefs trainees on each unit and explains the skills and knowledge required for accreditation (these are the “Elements of Competency & Performance Criteria” described in everyday user friendly language). Your skills and knowledge will be reviewed at the end of the unit as part of the assessment process.

STEP 2	Notes & Ideas
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Trainee reads about each unit. These cover the skills and knowledge plus any supplementary material required to bring the units up to date. Ponderous language and undue repetition are avoided.

STEP 3	Tasks – Q & A
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Trainee completes short tasks, often in a simple Q & A format to check that the notes have been read and understood. The aim is to encourage thought about retail issues. Each unit has a “Putting skills to work” task to record what has been learned from the unit.

STEP 4	Learning Activities
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These are longer , practical activities, most to be completed in a retail workplace or environment. If the trainee is employed in retail, then most can be done on site; but if not, they may take the form of “visit Coles and Woolworths supermarkets and report on how they”. Trainees not employed in retail can do the activities by:

- Visiting a friendly retailer and asking their help – “I am studying retailing and have to complete a project – would you mind if I looked at your display?”
- Visit a large store and masquerade as a shopper – take notes on your shopping list.

Your trainer will determine which activities are to be completed and the time and supervision required for each

Certificate II in Retail – Core units

If you are not employed in retail, there will be some activities which you will not be able to do eg. if you have no access to equipment such as computer terminals. In such cases you need to learn about the activity in theory or by observation – how are sales processed in this store? Feel free to ask your supervisor or trainer for help.

For Certificate II in Retail, skills NOW provides between 80 and 100 practical tasks and learning activities. It is recommended that all Tasks are completed as they relate directly to the accreditation skills. The trainer should determine which in store activities are to be done on the basis of relevance – there is no need to do them all – the trainer may wish to use others or none at all.

PART 2: TRAINEE ASSESSMENT

STEP 5	Trainee Assessment
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The assessment steps are grouped at the end of the book as assessors may wish to batch several together. Steps 3 and 4 are printed as separate sections – some trainers may want these to be handed in as evidence of completed work.

Preparation for the assessment is an important part of the learning process. Each units has several tables to be ticked of by trainee and trainer/assessor. Prior to assessment, the trainee is to complete the forms and ensure that all activities have been completed to the required standards. The preliminary work done by the trainee, the trainer/assessor role is verification and assessment. according to SIR07 guidelines. skills NOW tasks and learning activities are fully documented for easier and better assessment.

skills NOW - this book

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6 Interact with customers

SIRXCCS002A

STEP 1	Skills & Knowledge
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SIRXCCS002A Interact with customers is a core unit for Certificates I and II in Retail and Community Pharmacy and an elective unit for Wholesale. It shows how to improve customer satisfaction through better interaction and identification of their needs.

When you have completed this, you should be competent in:

- Delivering excellent customer service
- Responding to customer complaints
- Receiving and processing sales orders
- Identifying and satisfying special customer needs

Application & objectives

Whilst this unit is primarily for new entrants in retail, wholesale and community pharmacy, all staff should aim to develop excellent customer relationships. Its aim is to help you think about shoppers and how to better relate to them.

Employability skills

Retailers aim to develop and expand a loyal customer base which depend largely on developing excellent customer relationships. Retail employers seek staff who can relate positively with customers and trading partners.

Accreditation skills for this unit

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

1. Delivering customer service

You need to show that you understand that high customer service standards are essential if retailers are to deliver shopper satisfaction. You should to be able to:

- Communicate with customers in a friendly professional, courteous manner
- Satisfy customer needs and reasonable requests or, refer them to another staff member
- Accurately record customer information when making transactions
- Anticipate possible problems and take preventive action to avoid them
- Seek ways to deliver service, even beyond customer expectations
- Engage with the customer during the sales process and conclude the transaction in a professional, friendly manner
- Process customer returns or refunds according to store policies and procedures

2. Responding to customer complaints

You should understand the need to promptly and effectively resolve customer problems or complaints according to store policies and procedures. The aim should be to solve the problem before it becomes a complaint. To do this you need to:

- Convey a positive, helpful attitude to customers when handling problems and complaints
- Listen carefully to the customer to better understand and confirm the problem

- Take action to resolve the problem to customers' satisfaction wherever possible within your authority
- Refer any unresolved complaints to your supervisor
- Aim to turn the problem/complaint into a positive for your store by prompt friendly, helpful resolution
- Document your action as required
- Take follow up action as necessary to ensure customer satisfaction

3 & 4 Identifying special customer requirements & processing sales orders

Show that you can identify and satisfy customer special needs and process sales orders according to store policies and procedures. To do this you need to be able to:

- Accurately establish customer needs
- Record customer information accurately
- If not your area, refer the customer to the correct area
- Take the order – if necessary take a deposit to ensure a customer commitment
- Process the order efficiently

STEP 2	Notes & Ideas
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What is a customer?

A customer is defined as 'a person who buys goods or services from a shop or business' but this is too general as it treats all customers as the same. In practice, there may be several types of customer with different needs.

Before a person becomes a shopper, we must first attract them to the store (they become a store visitor) and interest them in the merchandise (they become a shopper). They only become a customer when they actually buy something.

Key issues are to:

1. Attract new customers to your store
2. Develop customers – sell more to them
3. Improve customer loyalty.

To improve customer relationships and sales, it is usually necessary to change customer shopping habits so that your store becomes their preferred shopping destination in your locality and industry. The steps are:

ideas
NOW

GOOD SERVICE REQUIRES A “WHOLE OF STORE” APPROACH
The customer will judge your service by their total shopping experience in your store – your store is as good as its weakest link.

TABLE 6.01 Seven steps to developing customers

Step	How	Benefit
1. Attract passer-by attention	Attractive premises, signage, windows, good customer access, sense of event.	Store presents as an attractive shopping destination.
2. Alert passer-by interest	Attract person to the store - 'something happening'.	An interesting store.
3. Convert passer-by to store visitor	Attract person to enter the store – clear entry, attractive merchandise.	Improved store presentation, greater store traffic.
4. Convert store visitor to customer	Good signage, attractive well priced merchandise in prominent locations.	Better merchandise promotion and locations.
5. Convert customer to regular customer	Good ranges, strong promotions – friendly service.	Emphasis on ranging, promotions and service.
6. Convert regular customer to a loyal customer	Consistently excellent service, an enjoyable shopping experience.	Emphasis on service; a shopper friendly environment.
7. Convert loyal customer to store advocate	Store service superior to others – customers recommend the store to friends as 'the place to go for!'	The best advertising possible and it's free!

Service is more than just processing a sale. If shoppers have difficulty in finding the product that they want, there is no staff to help them or that the staff don't know about the products, you may never learn about your poor service as the shopper may just walk out. Lost sales and lost reputations!

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PROVIDE BETTER SERVICE!

Don't aim to just match competitor service – by offering superior service you can establish an important point of difference and gain customer loyalty.

Show your customers that you care for them!

TABLE 6.02 Improving customer service

Issues	What to do
How to present your store	
Store appearance	The store should be clean, uncluttered, well signed with categories and products easy to find. Fixtures and signage to be in good condition.
Products	Attractive displays – damaged items and packaging to be removed from display.
Staff appearance	Appropriate uniforms (well maintained) for store identity and to maintain a high dress standard.
Staff conduct	Staff should avoid conduct which some customers may find impolite or offensive such as: Chewing gum or smoking (non smoking store preferred) Swearing Talking to each other across customer Talking or on phone whilst customers wait Shouting across store Arguing with customers

How to treat customers

Greeting shoppers	Smile and recognise shoppers as they enter the store – “Good morning - can I help you”? Staff to be friendly and helpful. Engage in conversation where possible.
Recognising customers	Where possible, greet customers by name and establish common interests eg customer business, football etc., so that the customer thinks of your store as a friendly, enjoyable shopping destination.
Helping shoppers	To help shoppers find categories and products you need to have a broad understanding of all departments, the store layout and the products that you carry. If you can't help them, ask another staff member who can to assist.
Sales techniques	Listen first to determine what the shopper really needs and recommend the most suitable products. If you don't know which product to recommend, get someone who does to provide customer advice.
Special attention	Try to give shoppers special attention to make them feel good. 'If you have any problems, then call me!'
Sales transactions	If you keep the sales transaction areas clean and uncluttered it will help you process transactions more efficiently.
Returns or refunds	Any shopper returns or refunds should be resolved quickly and politely according to store policy.
Customer farewell	Always show customers that you appreciate their business by thanking them, smiling and wishing them a pleasant day.

Product information

Category locations	To help shoppers find the products that they seek, staff should know store department and category locations.
Product knowledge	Sales staff should be trained in the products which they sell and how to use them. If they are uncertain, then they should ask someone who knows for help.

Responding to customer complaints

Is the customer always right?

An old retail adage is ‘the customer is always right’ but is this true? The underlying legal principle is ‘caveat emptor’ – ‘let the buyer beware’ which essentially means that if the buyer has inspected the goods and paid for them, then this is a binding transaction and the purchaser has no further rights under the contract.

In a retail environment, the great majority of transactions (98%+) are uneventful. If there are problems, the Australian Trade Practices Act 1974 and parallel state Fair Trading and Sales of Goods Acts give purchasers protection in the case of:

- Faulty merchandise eg. the product does not work
- Unsuitable merchandise eg. ‘this hairdryer is supposed to be 240 volt; I plugged it in and it blew up – I checked and it was only 110 volt.’ Or ‘I normally wear a size 10 frock – this is marked as size 10, but it is far too large.’ The product is not fit for their stated or normal purpose.
- Product supplied does not match the description or the sample.

Certificate II in Retail – Core units

Customers cannot however seek a refund if:

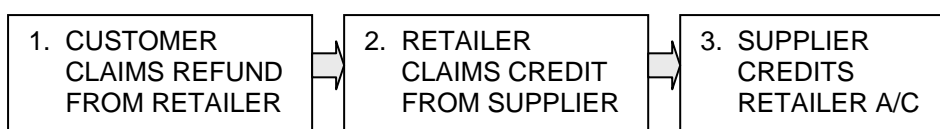
- They change their mind about the purchase.
- They have found a cheaper price or product elsewhere.
- They were aware of the product fault prior to purchase.
- The goods were damaged after purchase such as damage to a bicycle in an accident.

ideas
NOW

THINK FIRST!

Even if you are legally correct this does not mean that you should not give a refund – if the customer changes her mind it may be better to give a refund rather than create an incident or lose a customer. Your store policies should cover this. Many stores offer a “money back if not satisfied” policy. you can establish an important point of difference and gain customer

In cases of returns., the purchaser can claim a replacement item or a refund. In some case, the retailer may offer a repair. Many items such as electrical appliances are covered by a manufacturer’s warranty eg for 12 months. In case of a faulty product, the remedy chain is:



As well as merchandise problems, there may be customer complaints for issues such as:

- Service – ‘My new washing machine was to be delivered yesterday. I stayed home all day, but no one turned up!’
- Accounts – ‘My store account showed that I was charged \$99.00 for a pair of jeans, but they were on special for \$69.00 that week.’

Retailers face the problem, that even if they think they are in the right, it is usually best to quickly reach a solution which is suitable for both parties rather than have the problem drag on and get worse.

Tips for handling complaints

- Avoid a confrontational situation by conveying a positive, helpful attitude to customers when handling complaints. If the customer is agitated, calm them down first.
- Listen carefully to the customer to understand the nature of the complaint and confirm this with the customer.
- Any action taken to resolve the complaint should be in accordance with store policy – if you lack the authority to make a decision, then refer the problem to your supervisor.
- Always try to turn the complaint into a positive for your store by prompt friendly, helpful resolution.
- Your action should be recorded and processed according to store policies and procedures.
- Take follow up action as necessary to ensure customer satisfaction.

Sales orders and special customer needs

Most retail sales are made ex stock, but in some industries special orders are placed. For example to supply blinds and curtains for a new home, the retailer may:

- Show the customer the fabrics available and the fittings required
- Visit the house and measure the windows
- Quote a price for making, fitting and hanging

The retailer may often sub contract the manufacturing to another party so it is very important that all specifications and measurements are very accurate. Retailers need to provide customers with information in a clear, concise, understandable way to avoid possible problems.

Retailers should listen to customers carefully to identify special needs or requirements and indicate a willingness to assist with any issues or possible problems.

Special sales orders should be placed in accordance with store policy – some stores may ask for a deposit before the order is placed.

Promptly service customer needs or refer them to others who can help.

Do	Don't
<ul style="list-style-type: none"> • Think like a shopper – what do they need? • Work with your team to provide excellent service • Provide an attractive shopper friendly environment • Use a friendly, helpful approach when dealing with shoppers • Resolve any customer issue promptly and to the customer's satisfaction • If you cannot quickly resolve an issue refer it to your supervisor • Look for ways to make your store a more attractive shopping destination. 	<ul style="list-style-type: none"> • Don't operate your store for your own convenience – put shoppers first • Don't ignore shoppers – a friendly greeting • Don't brush off complaints – listen carefully to determine what it is • Don't argue with customers • Don't leave shopper issues un resolved

STEP 3	Tasks – Q & A
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Q 6.01T Inferior service

List occasions when you have experienced inferior retail service. How could the problems have been avoided?

A

Service problem	Problem prevention

Q 6.02T Solving a customer problem

A customer complains about a product purchase and the service received. How would you solve the problem?

A List the steps that you would take:

Step	Your action
The product	
The service	
The problem	
Customer demands	
Solution options	
Solution authorisation	

Putting skills to work - Interact with customers

List the knowledge or skills which you learned in this unit and describe how they can be used in a retail workplace.

Knowledge/Skills	Application

Task Summary	
Trainee	

Interact with customers SIRXCCS002A

Task	Start	Finish	Checked
6.01T Inferior service			
6.02T Solving a customer problem			
Putting skills to work			

STEP 4	Learning Activities
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6 Interact with customers

6.01 What is customer service?

The levels of service needed may vary considerably even within the same store eg in a supermarket, most groceries will be sold on a self selection basis, but personal service will be required at the delicatessen. List the departments in your store where special service may be required and describe the nature of the service.

If you are not employed in retail visit a large supermarket and complete the form to show the different service levels.

Department	Service requirement

6.02 Product returns policies and procedures

What are your store policies and procedures for handling product returns?

Policies

Authorisation

If you are not employed in retail determine the product returns policies for three retailers. You can determine these from catalogues and advertisements, in store signage or asking staff.

Retailer	Return or refund policy

6.03 Special customer needs and orders

If your store accepts special customer orders for products which you do not stock.

1. What is your store procedure?

2. How do you place a special order?

If you are not employed in retail then visit three specialist retailers and determine whether or not they take special customer orders and if any conditions apply such as size or value of order or deposit requirement.

Retailer	Special order policy

LEARNING ACTIVITY RECORD

TRAINEE	NUMBER

Interact with customers SIRXCCS002A

Learning activities	✓	Start	Finish	Checked
6.01 What is customer service?				
6.02 Product returns policies and procedures				
6.03 Special customer needs and orders				

Go to STEP 5 - Assessment

6 Interact with customers

SIRXCCS002A

STEP 5	Trainee Assessment
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Trainee Name	
Trainee Number	
Unit	Interact with customers SIRXCCS002A

1. Skills and knowledge

Trainees to demonstrate that they meet the unit elements of competency and performance criteria (called skills and knowledge).

Accreditation skill	Trainee ✓	Trainer ✓	Assessor ✓
If employed in retail do you know the store policies and procedures and any other regulations .applicable for this unit?			

1. Delivering customer service

How do you communicate with shoppers in a friendly professional, courteous way including during the sales process?			
Do you aim to satisfy customer needs and reasonable requests or, refer them to another staff member who can?			
How do you accurately record customer information when making transactions?			
How can you anticipate possible problems and take action to avoid them?			
Do you actively seek ways to deliver superior customer service? ,			
Can you process customer returns or refunds according to store procedures?			

2. Responding to customer complaints

How can you convey a positive, helpful attitude to customers when handling problems and complaints?			
Do you listen to the customer carefully to better understand and confirm the problem?			
Do you take action to resolve the problem to customers' satisfaction wherever possible within your authority?			
Do you refer any unresolved complaints to your supervisor?			
How can you turn a problem/complaint into a positive for your store?			
Do you know store procedures for documenting complaint action?			
What follow up action can be taken to ensure customer satisfaction?			

2. Unit notes

Trainees to have read the notes for this unit.

3. Tasks – Q & A

Trainees to have completed tasks and show an understanding of unit issues.

Task	✓	Trainer	Assessor
6.01T Inferior service			
6.02 T Solving a customer problem			
Putting skills to work			

4. Learning activities

Trainees should have completed those activities as selected by their trainer – there is no requirement to do them all – additional activities can be included. Assessment may be by observation or evidence by a third party.

Learning activities	✓	Trainer	Assessor
6.01 What is customer service?			
6.02 Product returns policies and procedures			
6.03 Special customer needs and orders			

5. Other tasks, activities and prior learning

List any other relevant tasks & activities completed and any prior learning recognised.

6. Third party evidence

I certify that I have observed the trainee perform the listed activities in the workplace to a consistently high standard and is competent in these skills.

Signed: Position: Date:

7. Employability skills

Trainees should learn employability skills through doing the practical activities. Tick those which are appropriate.

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	

8. Unit assessment

Based on the evidence provided and observation the trainee has been assessed as competent in this unit.

Trainee: Date:

Trainer: Date:

Assessor: Date:

Trainee Name		
Trainee Number		
Unit	Interact with customers SIRXCCS002A	C NYC