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GENERAL NOTICE

Notice 192 of 2000

SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

In accordance with regulation 24(2)(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Bodies (SGBs) for

Transport and Logistics Operations
Hairdressing, Cosmetology and Beauty; and
Retail and Wholesale

registered by National Standards Body 11, Services, publish the following unit standards-based qualifications for public comment.

This notice contains the titles, levels and purposes of the qualifications, and the titles and specific outcomes of the unit standards upon which the qualifications are based. The full qualifications and unit standards can be accessed via the SAQA web-site at www.saqa.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, 659 Pienaar Street, Brooklyn, Pretoria.

Comment on the qualifications and unit standards should reach SAQA at the address below *by no later than Monday 27 March 2000*. All correspondence should be marked **Standards Setting - 1** Name of SOB], and be addressed to

The Director: Standards Setting and
Development
SAQA
Attention: Mr MC. Cosser
Postnet Suite 248
Private Bag X 06
WATERKLOOF
0145

or faxed to 012 346-5812
or e-mailed to mcosser@saqa.co.za

SAMUEL B. A. ISAACS
EXECUTIVE OFFICER

NATIONAL CERTIFICATE IN PROFESSIONAL DRIVING

Field : Services
Sub-field : Transport Operations and Logistics
NQF Level : 3
Credits : 205

Purpose of qualification

- i. To provide a National Certificate for persons driving vehicles, carrying Freight or Passengers, for commercial purposes;

- ii. To enhance the employment prospects and marketable skills of drivers;
- iii. To enhance the professional status of drivers of commercial vehicles by awarding a formal qualification in recognition of their professional competence; and
- iv. To address the Industry's requirement for Drivers to have employable skills beyond that of a basic Driving License and Professional Driving Permit.

UNIT STANDARDS AT NQF LEVEL 2

1. Title : Conduct elementary heavy vehicle maintenance (Specific outcomes still to be generated)

UNIT STANDARDS AT NQF LEVEL 3

- 1. Title : Conduct communication and interpersonal relations
- 2. Title : Apply basic business principles
- 3. Title : Occupational health, safety, and general housekeeping
- 4. Title : Obtain and communicate transport operational information
- 5. Title : Understand the road transport industry on South Africa
- 6. Title : Foster and maintain customer relations
- 7. Title : Provide commuter services
- 8. Title : Provide tour coach services
- 9. Title : Provide long distance coach/bus services
- 10. Title : Convey general freight
- 11. Title : Convey hazardous goods
- 12. Title : Convey livestock
- 13. Title : Convey abnormal freight
- 14. Title : Operate lift trucks
- 15. Title : Operate cranes
- 16. Title : Manage SMME's (Specific outcomes still to be generated)

UNIT STANDARDS AT NQF LEVEL 4

- 1. Title : Manage self-development
- 2. Title : Operate a rigid vehicle
- 3. Title : Operate a vehicle combination consisting of a drawing vehicle and trailer/s
- 4. Title : Guide tourists (Specific outcomes still to be generated)

UNIT STANDARDS FOR PROFESSIONAL DRIVING

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES - NQF LEVEL 3

1. Title : Conduct communication and interpersonal relations

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| Specific outcome 1.1: | Describe the method(s) for collating, recording, storage and retrieval of information and workplace records. |
| Specific outcome 1.2: | Respond timeously and appropriately to the receipt of communications and the dissemination of information to internal and external (written, verbal, and/or electronic). |
| Specific outcome 1.3: | Generate communications (e.g. document style) in accordance with prevailing organisational and industry requirements and norms. |
| Specific outcome 1.4: | Select the correct medium to use in the generation, handling and processing of documents and communication (e.g. e-mail, internet, fax). |
| Specific outcome 1.5: | Prioritise activities to facilitate an efficient flow of communication and documentation for the enhancement of the organisation's image. |

2. Title : Apply basic business principles

- Specific outcome 2.1: Describe the cost-effective and productive utilisation of machinery, equipment, materials and time allocated to the individual.
- Specific outcome 2.2: Identify and apply goals aligned to the work situation, which reflect the organisational goals.
- Specific outcome 2.3: Maintain and enhance organisational image and customer service (both internal and external).
- Specific outcome 2.4: Identify and anticipate customer's requirements, and meeting those requirements within budget constraints.
- Specific outcome 2.5: Select and implement the most effective business solution to problems within own operational environment and level of authority.

3. Title : Occupational health, safety, and general housekeeping

- Specific outcome 3.1: Describe the suitability and correct use of protective clothing and equipment in relation to specific freight/commodities and environments.
- Specific outcome 3.2: Describe the basic first-aid skills (i.e. the means to preserve life; to stabilize the condition; to promote recovery; to secure the immediate environment), precautions needed for AIDS prevention (e.g. dealing with blood-related injuries).
- Specific outcome 3.3: Describe the implementation and compliance with the relevant procedures, material requirements and methodologies in maintaining prescribed safety, health and environmental standards in the workplace (e.g. ensure cleanliness, report faulty equipment, and prevent spillages).
- Specific outcome 3.4: Implement selected mechanisms for the minimising of safety, health and environmental impacts and risks as specified in current legislation (e.g. Occupational Health and Safety Act) NOSA requirements and organisational policies (e.g. removal of waste).
- Specific outcome 3.5: Describe the corrective action to be taken with regard to accidents, incidents and potential safety, health and environmental hazards (e.g. gases, fumes etc) within specific work environments.

4. Title : Obtain and communicate transport operational information

- Specific outcome 4.1: Obtain operational information required for a trip
- Specific outcome 4.2: Communicate required information to role-players

5. Title : Understand the road transport industry on South Africa

- Specific outcome 5.1: Demonstrate an understanding of road transport legislation and regulations
- Specific outcome 5.2: Demonstrate knowledge of road transport operations in South Africa
- Specific outcome 5.3: Demonstrate knowledge of features of the South African road transport industry
- Specific outcome 5.4: Reflect on the cost associated with the operations of road transport services

Specific outcome 5.5: Demonstrate knowledge of career paths in the road industry transport

6. Title : Foster and maintain customer relations

Specific outcome 6.1: Establish and maintain sound relations with customers

Specific outcome 6.2: Inform customers

Specific outcome 6.3: Resolve customer complaints

Specific outcome 6.4: Satisfy customer needs

Specific outcome 6.5: Monitor customer satisfaction and new service opportunities

7. Title : Provide commuter services

Specific outcome 7.1: Prepare the vehicle, equipment and documentation

Specific outcome 7.2: Load, drive and off-load passengers with specific attention to safety and comfort

Specific outcome 7.3: Collect payments and issue passenger tickets

Specific outcome 7.4: Complete trip or shift information

Specific outcome 7.5: Adhere to service contractual specifications

Specific outcome 7.6: Provide operational information

8. Title : Apply basic business principles

Specific outcome 8.1: Prepare the coach/bus, documentation and ancillary equipment for the journey

Specific outcome 8.2: Collect passengers from arrival points and deliver them at destinations

Specific outcome 8.3: Drive the coach/bus with specific attention to safety and comfort

Specific outcome 8.4: Receive and deliver luggage

Specific outcome 8.5: Assist passengers with reservations, and arrival-, checking in- and departure procedures

Specific outcome 8.6: Complete journal and operational information

9. Title : Provide tour coach services

Specific outcome 9.1:	Welcome and inform tourists
Specific outcome 9.2:	Co-host tour groups
Specific outcome 9.3:	Solve conflict between individuals and groups
Specific outcome 9.4:	Solve problems experienced by individual members or tour groups
Specific outcome 9.5:	Act as an ambassador for the country
Specific outcome 9.6:	Complete tour or journey and operational information
Specific outcome 9.7:	Reflect on national importance of providing quality services to tourists

10. Title : Convey general freight

Specific outcome 10.1:	Prepare for loading/off loading process
Specific outcome 10.2:	Conduct loading process
Specific outcome 10.3:	Secure freight according to product requirements
Specific outcome 10.4:	Drive vehicle in a manner such as to ensure the maintenance of freight quality
Specific outcome 10.5:	Conduct off-loading process

11. Title : Convey hazardous good.

Specific outcome 11.1:	Carry and display relevant legal documentation
Specific outcome 11.2:	Apply safety and standard operating procedures during loading, off-loading and transportation
Specific outcome 11.3:	Apply safety procedures in the event of an accident / incident / spillage
Specific outcome 11.4:	Drive vehicle in a manner which takes cognisance of the load

12. Title : Convey livestock

Specific outcome 12.1:	Transport animals in cargo space, according to regulations
Specific outcome 12.2:	Group animals according to regulations
Specific outcome 12.3:	Inspect animals during transportation, according to regulations
Specific outcome 12.4:	Load and unload animals according to regulations

- Specific outcome 12.5: Feed animals according to regulations
- Specific outcome 12.6: Take care of animals whilst driving
- Specific outcome 12.7: Deal with the emergency situations according to regulations
- Specific outcome 12.8: Complete and carry documents as per regulations

13. Title : Convey abnormal freight

- Specific outcome 13.1: Inspect the load
- Specific outcome 13.2: Ensure that vehicle and load complies with the conditions as per exemption permit
- Specific outcome 13.3: Consider abnormal load effects whilst driving

14. Title : Operate lift trucks

- Specific outcome 14.1: Describe the identification and classification of freight taking into account documentation; packaging and labelling associated with the specific freight.
- Specific outcome 14.2: Describe the handling, loading and storage of freight in accordance with laid down standards, environmental requirements, and with due consideration to *inter-alia* the commodities and their properties, storage area, placement on vehicle/into hold of vessel.
- Specific outcome 14.3: Describe the achievement of maximum work performance through handling of lifting equipment and attachments, by applying knowledge of equipment dimensions, controls and capacities.
- Specific outcome 14.4: Describe the handling and parking of equipment in accordance with laid down organisational and legislative standards and procedures as well as manufacturer's guidelines.
- Specific outcome 14.5: Access available support systems and emergency services in case of incidents and accidents.

15. Title : Operate cranes

- Specific outcome 15.1: Describe safety and suitability of crane prior to utilisation thereof giving cognizance to freight characteristics, equipment' manufacturers' requirements and environmental conditions.
- Specific outcome 15.2: Identify the recognised methods for inspecting and recording the operational fitness of all components of the crane (e.g. structural components, hydraulic systems, cab, fastenings, outriggers, ropes/chains etc) with reference to safety procedures in the workplace.
- Specific outcome 15.3: Follow recognised hand signals (and other methods of communication) and to direct the crane movements accordingly, whilst advising and/or adjusting to circumstances in the interests of safety.
- Specific outcome 15.4: Describe the identification of potential mechanical faults before and during operation and corrective measures that may be required.

Specific outcome 15.5: Describe corrective actions required to prevent hazardous/dangerous situations arising (e.g. weather, light conditions, noise etc)

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES - LEVEL 4

1. Title : Manage self-development

Specific outcome 1.1: Describe the skills and knowledge required for the development of his/her career path, giving cognisance to personal objectives and present and future requirements of the individuals organisational role.

Specific outcome 1.2: Make and update personal plans for developing skills to improve performance where such plans contain challenging, realistic and measurable objectives.

Specific outcome 1.3: Prioritise goals and objectives, taking cognisance of organisational opportunities and constraints, policies, requirements and personal resources (e.g. internal or external).

Specific outcome 1.4: Select mechanisms for pursuing feedback of current levels of competence and personal growth (e.g. communicate with superiors), and planning the appropriate corrective action to accomplish his/her objectives.

Specific outcome 1.5: Describe the sourcing, selecting and utilising the requisite resources for the successful achievement of planned objectives, drawing on the experience and guidance of senior management.

Specific outcome 2.6: Describe how to minimise digressions or obstacles for the successful achievement of self-development objectives, making contingency plans if required (e.g. delegate work responsibilities).

2..Title : Operate a rigid vehicle

Specific outcome 2.1: Prepare a vehicle for a trip

Specific outcome 2.2: Drive a rigid vehicle in accordance with K53, manufacturer, legal and defensive driving requirements

Specific outcome 2.3: Handle emergency situations

Specific outcome 2.4: Reflect in vehicle performance, as well as the manner in which he/she operates the vehicle

3. Title : Operate a vehicle combination consisting of a drawing vehicle and trailer/s

Specific outcome 3.1: Prepare vehicle combination for a trip

Specific outcome 3.2: Drive a vehicle combination in accordance with K53, manufacturer, legal and defensive driving requirements

Specific outcome 3.3: Reflect an vehicle performance as well as- the manner in which he/she operates a vehicle

Specific outcome 3.4: Couple and uncouple a drawing vehicle and trailer(s)

Specific outcome 3.5: Reflect on the impact of additional trailers on the dynamics of the vehicle combination

NATIONAL CERTIFICATE IN AFRO HAIRDRESSING

Field : Services
Sub-field : Personal Care
NQF Level : 4
Credits : 163

Purpose of qualification:

To equip a person with a meaningful and credible nationally recognised qualification relevant to Afro hairdressing

UNIT STANDARDS FOR AFRO HAIRDRESSING

Unit standards at NQF Level 2

- 1. Title : Induction to hairdressing training
- 2. Title : Shampoo of Afro hair
- 3. Title : Wet hair design for Afro hair

Unit standards at NQF Level 3

- 1. Title : Communication for Afro hairdressers
- 2. Title : Sanitation and sterilisation
- 3. Title : Receive and consult with clients
- 4. Title : Condition Afro hair
- 5. Title : Salon support services
- 6. Title : Dry hair design for Afro hair
- 7. Title : Cut and shape Afro hair

Unit standards at NQF Level 4

- 1. Title : Hair and scalp disorders and diseases
- 2. Title : Retail in the hairdressing industry
- 3. Title : Hair colouring and lightening for Afro hair
- 4. Title : Perm Afro hair
- 5. Title : Hair relaxing of Afro hair
- 6. Title : Proficiency in salon services

UNIT STANDARDS FOR AFRO HAIRDRESSING

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES NQF 2

- 1. Title : Induction to hairdressing training

Specific outcome 1.1: Explain and discuss the conditions of an apprenticeship/learnership within the Hairdressing Industry to determine the different structures in the Hairdressing Industry.

Specific outcome 1.2: Explain and discuss the apprenticeship/learnership contract to determine the relationship with the Hairdressing Industry.

Specific outcome 1.3: Explain and describe the skills required of an apprentice within the Hairdressing Industry.

- 2. Title : Shampoo Afro hair

Specific outcome 2.1: Demonstrate the correct procedure for draping and protecting the client in readiness for salon services to ensure adequate protection.

- Specific outcome 2.2: Select the appropriate shampoo product and service according to requirements of client and perform the required shampooing service and recommend products for home care.
- Specific outcome 2.3: .Record information on an analysis card for future references according to salon procedures

3. Title : Wet hair design for Afro hair

- Specific outcome 3.1: Describe and explain the design of whole head of finger waves on previously texturised hair using the fingers and comb only.
- Specific outcome 3.2: Design a whole head of finger waves on previously texturised hair making use of mechanical aids.
- Specific outcome 3.3: .Design short, medium and long hairstyles with the use of rollers.

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES NQF LEVEL 3

1. Title : Communication for Afro hairdressers

- Specific outcome 1.1: Communicate effectively with clients and colleagues by using oral communication to enhance the professional image of the business and industry.
- Specific outcome 1.2: Demonstrate positive body language and apply non-verbal communication skills to enhance the professionalism of the business and industry.
- Specific outcome 1.3: Communicate effectively with clients and colleagues using written communication in order to enhance the professional image of the business and the industry.

2. Title : Sanitation and sterilisation

- Specific outcome 2.1: Demonstrate and discuss the different methods of sterilisation and sanitation procedures performed in the salon according to industry accepted standards.
- Specific outcome 2.2: Demonstrate and explain the cleaning, sanitising and sterilising of equipment, materials and tools in the salon environment.
- Specific outcome 2.3: Recognise explain and demonstrate First Aid procedures applicable to salon practices.

3. Title : Receive and consult with clients

- Specific outcome 3.1: Receive clients and establish a relaxed relationship in taking care of clients needs according to salon procedures.
- Specific outcome 3.2: Receive enquiries around appointments and salon services and deal with them according to salon procedures.
- Specific outcome 3.3: Consult with the client in a professional manner and analyse the hair and scalp to determine the appropriate procedure for the specified service.

4. Title : Condition Afro hair

- Specific outcome 4.1: Identify and select the appropriate products according to hair and scalp analysis to improve the condition of the hair.

Specific outcome 4.2:	Describe the application of the correct conditioner and apply surface or instant conditioner according to manufacturer's instructions to ensure correct use.
Specific outcome 4.3:	Identify and recommend products for home care and prepare the client for further services.
Specific outcome 4.4:	Recognise and treat common hair conditions for selection of the treatment products required and appropriate application procedures.
Specific outcome 4.5:	Identify and select the correct massage technique and perform the correct procedures for the treatment as required.
Specific outcome 4.6:	Identify and describe the treatment of common scalp conditions and select the treatment products required the appropriate application method and massage techniques and perform the correct procedures for the particular treatment required.

5. Title : Salon support services

Specific outcome 4.1:	Explain and describe the ordering and receiving stock from a supplier to ensure the correct quantity and quality of stock is available.
Specific outcome 4.2:	Check items received against an invoice or stock book; unpack; open; decant; measure and dilute products where necessary and record their use according to instructions and salon procedures.
Specific outcome 4.3:	Explain and describe the successful handling of salon business by telephone.
Specific outcome 4.4:	Demonstrate the correct calculation and supply the final price for services rendered and products bought by the clients.
Specific outcome 4.5:	Explain and describe the effective keeping of salon records.

6. Title : Dry hair design for Afro hair

Specific outcome 6.1:	Determine, after consultation, the most aesthetically suitable hairstyle for the client.
Specific outcome 6.2:	Demonstrate the designing of the hairstyle with the aid of curling tongs according to customer requirements.
Specific outcome 6.3:	Explain and determine after consultation, the most aesthetically suitable hairstyle for the client.
Specific outcome 6.4:	Demonstrate and design a style with single and multiple strands.
Specific outcome 6.5:	Explain, demonstrate and design the most aesthetically suitable hairstyle by attaching hair extensions to the natural hair.

7. Title : Cut and shape Afro hair

Specific outcome 7.1:	Explain and describe, after consultation, with the client, the most suitable hairstyle.
Specific outcome 7.2:	Demonstrate and design the hairstyle by identifying the correct cutting techniques, procedures and use of implements.

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES NQF LEVEL 4

1. Title : Hair and scalp disorders and diseases

- Specific outcome 1.1: Recognise hair and scalp disorders and diseases to determine the correct treatment.
- Specific outcome 1.2: Explain and describe the possible causes of scalp disorders to determine corrective treatment.
- Specific outcome 1.3: Explain and advise corrective treatment in the case of hair and scalp disorders.

2. Title : Retail in the hairdressing industry

- Specific outcome 2.1: Explain and discuss the correct techniques for selling within the Hairdressing Industry.
- Specific outcome 2.2: Identify and describe various selling techniques for the successful selling of hairdressing products and services.
- Specific outcome 2.3: Describe and explain the necessary skills for the successful selling of products and services.

3. Title : Hair colouring and lightening for Afro hair

- Specific outcome 3.1: Analyse the hair and scalp to determine most appropriate colouring treatment.
- Specific outcome 3.2: Describe and explain the correct methods to identify the natural colour of the hair
- Specific outcome 3.3: Select the appropriate semi permanent colour for the hair and demonstrate the correct procedure for applying semi permanent colour to different types of hair.
- Specific outcome 3.4: Analyse the hair and scalp to identify the natural hair colour to determine the appropriate selection of permanent colour.
- Specific outcome 3.5: Describe and apply permanent colour to different types of hair according to correct procedures and techniques.
- Specific outcome 3.6: : Analyse the hair and scalp to select the appropriate lightening product for the hair and apply lightening colour products to different types of hair

4. Title : Perm Afro hair

- Specific outcome 4.1: Analyse the hair and scalp to select the appropriate permanent wave product and tools for the hair.
- Specific outcome 4.2: Explain and describe the correct procedure for applying permanent wave services to different types and lengths of hair.
- Specific outcome 4.3: Apply permanent wave services to different types and lengths of hair according to specified methods and procedures.

5. Title : Hair relaxing for Afro hair

- Specific outcome 5.1: Analyse the hair and scalp to determine the most appropriate relaxing treatment.
- Specific outcome 5.2: Explain and describe the correct procedure for performing hair relaxing services to different types and lengths of hair.

Specific outcome 5.3: Perform hair-relaxing services by selecting the appropriate chemical hair relaxing products and tools for the hair.

6. Title : Proficiency in hairdressing services

Specific outcome 6.1: Apply integrated shampooing, cutting, perming and setting to produce a complete change of style in a commercially viable time.

Specific outcome 6.2: Apply and demonstrate integrated shampooing, conditioning, cutting, permanent colouring and tonging to produce a complete change of style in a commercially viable time.

Specific outcome 6.3: Describe and demonstrate integrated shampooing, conditioning, cutting, relaxing and fingerwaving to produce a complete change of style in a commercially viable time.

Specific outcome 6.4: Plan and execute three daily salon sessions integrating shampooing, conditioning, cutting, perming, relaxing, colouring, tonging, setting, costing and record keeping to produce effective styles on a range of clients in a commercially viable time.

NATIONAL CERTIFICATE IN RETAIL AND WHOLESALE PROCESSES

Field : Services
Sub-field : Retail and Wholesale
NQF Level : 2
Credits : 172

Purpose of qualification

This qualification is registered at level 2 on the National Qualifications Framework. It provides learners with the opportunity to access learning in broad retail and wholesale practices, which includes opportunities for learners to open own outlets, retailing or wholesaling a wide range of products. Learners will be able to combine fundamental, contextual and specialised learning outcomes and operate to standards linked to best practice in retailing and wholesaling. Learners will, once qualified, be able to demonstrate competence in administration, cash, promotions, safety, stock, service, and the displaying and marking of a range of merchandise. Learners will also understand the retail industry, its structures and terms. An optional area of learning exists where learners who are involved in credit will be able to access this as an "optional extra".

Learners will have a choice of elective areas, where they will be able to **apply retail and wholesale practices** in either:

- Clothing, textiles, footwear and accessories.
- Furniture and appliances.
- Food handling.
- Other speciality areas, which will be enhanced as the needs in retail and wholesale, emerge.

The fundamental learning which learners will acquire will allow them to be able to perform basic business calculations, compile verbal and written communications and use basic computer technology.

UNIT STANDARDS FOR RETAIL AND WHOLESALE PROCESSES

Unit standards for NQF level 2

1. Title : Perform basic business calculations in Retail/Wholesale practices
2. Title : Compile verbal and written communications in Retail/Wholesale practices

- 3. Title : Use computer technology in Retail/Wholesale practice
- 4. Title : Process Retail/Wholesale documents
- 5. Title : Handle cash
- 6. Title : Display and mark merchandise
- 7. Title : Understand industry, structures, terms and concepts
- 8. Title : Promote merchandise
- 9. Title : Apply safety, security and housekeeping
- 10. Title : Attend to customers
- 11. Title : Handle stock
- 12. Title : Process credit transactions (optional)
- 13. Title : Apply speciality merchandise in Retail/Wholesale practices
- 14. Title : Apply CFTA Retail/Wholesale practices
- 15. Title : Apply furniture and appliance Retail/Wholesale practices
- 16. Title : Apply food handling Retail/Wholesale practices

UNIT STANDARDS FOR RETAIL AND WHOLESALE PROCESSES

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES NQF LEVEL 2

1. Title : Perform basic business calculations in Retail/Wholesale practices

- Specific outcome 1.1: Relate basic business calculations to a range of techniques applied in retail/wholesale practices when selling goods for profit
- Specific outcome 1.2: Recognise the legal requirements associated with value added tax calculations
- Specific outcome 1.3: Apply techniques in performing a range of basic business calculations
- Specific outcome 1.4: Use a range of electronic equipment to enhance efficiency and accuracy when making basic business calculations

2. Title : Compile verbal and written communications in Retail/Wholesale practices

- Specific outcome 2.1: : Promote the image of organisation by acknowledging customer service standards and sound business etiquette when communicating verbally or in writing with external and internal customers
- Specific outcome 2.2: Apply a range of verbal communication techniques appropriate to context when interacting with internal and external customers
- Specific outcome 2.3: Apply retail/wholesale business terminology in context when communicating verbally or compiling written communications
- Specific outcome 2.4: Compile a range of written business communications utilising layouts and formats appropriate to retail/wholesale
- Specific outcome 2.5: Comply with a range of general administration procedures for written communications

3. Title : Use computer technology in Retail/Wholesale practices

- Specific outcome 3.1: Develop an understanding of computer terminology and recognising a range of computer hardware and software applications
- Specific outcome 3.2: Apply basic keyboard and mouse pointer techniques for capturing and processing data on computers and point of sale equipment/terminals

- Specific outcome 3.3: Apply a range of techniques for using tools, accessories, and application associated with Windows-based operating systems
- Specific outcome 3.4: Open, create, save and retrieve information using appropriate word processing/ spread sheeting software for generating basic business documents
- Specific outcome 3.5: Capture transactional data, printing cash receipts and updating customer account records using computerised systems and associated software

4. Title : Process Retail/Wholesale documents

- Specific outcome 4.1: Collect and check completeness and accuracy of a range of documentation reflecting information relating to cash/ credit/ stock purchase transactions in retail/wholesale outlets
- Specific outcome 4.2: Process and maintain transaction documentation using manual/ electronic systems for capturing and updating information relating to cash/ credit stock transactions conducted by retail/wholesale outlets
- Specific outcome 4.3: Compile a range of reports reflecting information captured and processed for cash/credit stock transactions in retail/wholesale
- Specific outcome 4.4: Verify inaccuracies reflected on transaction documents and reporting discrepancies in accordance with administration procedures in retail/wholesale

5. Title : Handle cash

- Specific outcome 5.1: Count, sort and replenish amounts of money for maintaining cash floats at point of sale in retail/wholesale outlets
- Specific outcome 5.2: Accept and secure a range of payment methods received at points of sale for cash transactions in retail/wholesale outlets
- Specific outcome 5.3: Record payment details and issuing cash receipts using a range of point sale equipment for finalising cash transactions in retail/wholesale outlets
- Specific outcome 5.4: Verify and accept appropriate cash refund transactions for customers returning merchandise in retail/wholesale outlets
- Specific outcome 5.5: Balance cash transactions in accordance with cashing-up procedures on completion of day's trading in retail/wholesale

6. Title : Display and mark merchandise

- Specific outcome 6.1: Display merchandise using a range of techniques for arranging merchandise on display units in retail/wholesale outlets
- Specific outcome 6.2: Mark merchandise using a range of techniques for indicating prices on merchandise and display units in retail/wholesale outlets
- Specific outcome 6.3: Perform a range of housekeeping activities for maintaining quantity, quality and presentation of merchandise displays in retail/wholesale outlets

7. Title : Understand industry, structures, terms and concepts

- Specific outcome 7.1: :Identify stakeholders and associated roles to contextualise the retail/wholesale industry in the economy

- Specific outcome 7.2: Relate processes and support functions to different sub-sectors making up retail/wholesale industry
- Specific outcome 7.3: Understand general terms and concepts used in retail/wholesale environments
- Specific outcome 7.4: Recognise the roles of large and small retailers/wholesalers in the retail/wholesale industry

8. Title : Promote merchandise

- Specific outcome 8.1: Assemble and dismantle a range of indoor and outdoor displays according to layout plans for displaying promotional merchandise
- Specific outcome 8.2: Arrange merchandise and promotional signage according to layout plans for promotional displays in retail/wholesale outlets
- Specific outcome 8.3: Maintain merchandise displays to ensure sufficient supplies of promotional merchandise in retail/wholesale outlets
- Specific outcome 8.4: Communicate promotional activities to customers using a range of techniques for informing customers of merchandise promotions in retail/wholesale outlets
- Specific outcome 8.5: Demonstrate product end uses and orientating customers with the merchandise promotions in retail/wholesale outlets

9. Title : Apply safety, security and housekeeping

- Specific outcome 9.1: : Respond to emergency situations by contacting services for assistance during emergency situations
- Specific outcome 9.2: Respond to instructions given out by safety representatives requiring staff co-operation during emergency situations in retail/wholesale outlets
- Specific outcome 9.3: : Evacuate customers and staff from buildings during a range of emergency situations arising in retail/wholesale outlets
- Specific outcome 9.4: Monitor safety of staff and customers by applying appropriate procedures for crime-related incidents in retail/wholesale outlets
- Specific outcome 9.5: Apply a range of safety techniques when maintaining shelving and point displays in retail/wholesale outlets
- Specific outcome 9.6: Maintain safety of working environments when disposing of a range of hazardous merchandise stocked in retail/wholesale outlets

10. Title : Attend to customers

- Specific outcome 10.1: Respond openly and objectively when attending to a range of customer queries in retail/wholesale outlets
- Specific outcome 10.2: Direct customers to appropriate internal resources for resolving customer queries in retail/wholesale outlets
- Specific outcome 10.3: Maintain ongoing customer service during busy trading periods by assisting co-workers attending to customers in retail/wholesale outlets

11. Title : Handle stock

- Specific outcome 11.1: Check a range of stock characteristics to ensure quantity and quality of merchandise received into stock by retail/wholesale outlets

Specific outcome 11.2:	Pack stock using a range of packing containers and packaging materials to secure and protect various categories of merchandise received into stock by retail/wholesale outlets
Specific outcome 11.3:	Stack, rotate and off-load stock using pallet-jacks, trolleys, ladders and hysters for lifting and transporting packed merchandise received into stock by retail/wholesale outlets
Specific outcome 11.4:	Mark and code stock using a range of techniques and equipment for identifying merchandise received into stock by retail/wholesale outlets
Specific outcome 11.5:	Count stock using a range of techniques and equipment for estimating quantities of saleable and unsaleable merchandise received into stock by retail/wholesale outlets
Specific outcome 11.6:	Maintain stock using a range of housekeeping techniques for merchandise received into stock by retail/wholesale outlets

12. Title : Process credit transactions (optional)

Specific outcome 12.1:	Assist customers applying for credit facilities by identifying and explaining a range of credits terms and conditions relating to credit granting procedures in retail/wholesale
Specific outcome 12.2:	Record a range of credit application details onto customer database systems and updating existing customer records when payment instalments are received for credit transactions in retail/wholesale outlets
Specific outcome 12.3:	Process and distribute invoices/statements to customers and recording payments received for merchandise purchased on credit in retail/wholesale outlets
Specific outcome 12.4:	Respond to a range of customer complaints and queries relating to credit granting procedures in retail and wholesale

13. Title : Apply speciality merchandise in Retail/Wholesale practices

Specific outcome 13.1:	Apply a range of techniques for handling and packing stacks of speciality merchandise in accordance with customer requirements ensuring that the risk of damage to stock is minimised during handling operations
Specific outcome 13.2:	Dispose of stock in accordance to legal requirements
Specific outcome 13.3:	Display speciality merchandise in accordance with layout specification ensuring that full displays are maintained
Specific outcome 13.4:	Advise relevant parties when basic lines run low and following procedures regarding high shrinkage items
Specific outcome 13.5:	Apply knowledge of products, prices and store layout when responding to a range of customer queries relating to speciality merchandise
Specific outcome 13.6:	Assist customers by demonstrating end-uses of speciality merchandise using a range of equipment to enhance product demonstrations
Specific outcome 13.7:	Use a range of specialised equipment to customise speciality merchandise to individual customer requirements
Specific outcome 13.8:	Develop an awareness of competitor pricing and promotion tactics and informing line management of competitor activities

14. Title : Apply CFTA Retail/Wholesale practices

Specific outcome 14.1:	Identify product sizes and apply appropriate fitting techniques to satisfy customer requirements
Specific outcome 14.2:	Present and highlight a range of merchandise characteristics for attracting customer interest in merchandise sales
Specific outcome 14.3:	Pack customer purchase using a range of techniques for ensuring packaging is appropriate to product and customer requirements
Specific outcome 14.4:	Assist customers to select appropriate merchandise by offering advice on fashion and seasonal trends
Specific outcome 14.5:	Respond to a range of customer requests and communicating merchandising issues and suggestions to line management
Specific outcome 14.6:	Apply a range of knowledge and skills when merchandising CFTA products in accordance with set standards and current fashion trends

15. Title : Apply furniture and appliance Retail/Wholesale practices

Specific outcome 15.1:	Receive furniture/appliance stocks and repossessions in accordance with company procedures and performing a range of safety, security and housekeeping activities for assembling, maintaining, moving and securing of stock of furniture and appliance
Specific outcome 15.2:	Check stock availability and condition, loading furniture/appliances onto trucks in accordance with delivery routes and ensuring packing and securing material is appropriate for protecting furniture/appliances during transportation
Specific outcome 15.3:	Collect despatch documents, confirming deliveries by cross checking stock against documentation and performing vehicle, load and documentation checks before proceeding with furniture/appliance deliveries
Specific outcome 15.4:	Obtain proof of delivery and recording customer feedback when assembling furniture/appliances at point of delivery and receiving stock accordance with company procedures for repossessed goods and trade-ins
Specific outcome 15.5:	Receive, record and secure cash transactions at point of sale, directing customers to appropriate resources for resolving queries and assisting customers to complete credit application forms
Specific outcome 15.6:	Apply a range of techniques for assembling furniture/appliance displays in accordance with display layout plans and promotion material ensuring deposit and monthly payment terms are clearly visible to customers
Specific outcome 15.7:	Provide customer service by explaining features and benefits of product and services, advise customers of available credit terms, demonstrate product end uses and check product availability with stores

16. Title : Apply food handling Retail/Wholesale practices

Specific outcome 16.1:	Apply a range of techniques for merchandising perishables (frozen, chilled and fresh) foods in food handling retail/wholesale outlets
Specific outcome 16.2:	Pack and labell perishable food products ensuring packing and product identification is in accordance with packaging specifications
Specific outcome 16.3:	Apply a range of techniques for monitoring perishable food stocks in accordance with safety and legal requirements for food handling retail/wholesale outlets

Specific outcome 16.4:	Maintain personal and food hygiene standards by wearing protective clothing and apply measures to eliminate waste in food handling departments in retail/wholesale outlets
Specific outcome 16.5:	Use refrigeration equipment and monitoring temperature-controlled environments in accordance with cold-chain practices for food handling retail/wholesale outlets

NATIONAL CERTIFICATE IN RETAIL AND WHOLESALE, SALES AND SERVICE TECHNOLOGY

Field	: Services
Sub-field	: Retail and Wholesale
NQF Level	: 4
Credits	: 180

Purpose of qualification

This qualification is registered at level 4 of the National Qualifications Framework. Learners acquiring this qualification will demonstrate competence across areas including retail administration, customer services, cash and stock. Three optional areas exist for learners who are involved in selling and / or buying and / or credit transactions.

Learners will have a choice of elective areas where they will be able to *implement retail and wholesale practices* in either:

- Clothing, textiles, footwear and accessories.
- Furniture and appliances.
- Food handling.
- Other speciality areas, which will be enhanced as the needs in retail and wholesale, emerge.

The fundamental learning which learners will acquire will allow them to be able to compile and deliver presentations, generate electronic data and interpret financial reports.

UNIT STANDARDS FOR RETAIL AND WHOLESALE, SALES AND SERVICE TECHNOLOGY

Unit standards at NQF level 4

1. Title : Compile and deliver presentations and persuasive written communication to enhance retail/wholesale practices
2. Title : Generate electronic data to enhance retail/wholesale practices
3. Title : Interpret financial reports in retail/wholesale
4. Title : Monitor flow of retail/wholesale documents
5. Title : Monitor cash systems in retail/wholesale
6. Title : Co-ordinate promotional activities
7. Title : Provide customer service
8. Title : Process stock
9. Title : Sell goods and services (optional)
10. Title : Buy merchandise (optional)
11. Title : Monitor credit in retail/wholesale (optional)
12. Title : Implement speciality merchandise in retail/wholesale practices
13. Title : Implement CFTA retail/wholesale practices
14. Title : Implement furniture and appliance retail/wholesale practices
15. Title : Implement food handling retail/wholesale practices

UNIT STANDARDS FOR RETAIL AND WHOLESALE, SALE AND SERVICE TECHNOLOGY

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES NQF LEVEL 4

Unit standards at NQF level 4

1. Title : Compile and deliver presentations and persuasive written communication to enhance retail/wholesale practices

Specific outcome 1.1: Relate the purpose and content of a range of persuasive written communications to business contexts

Specific outcome 1.2: Apply a range of techniques for compiling persuasive written communications in business contexts

Specific outcome 1.3: Compile a range of graphic visuals and effects utilising appropriate software applications and tools

Specific outcome 1.4: Apply a range of techniques for delivering effective presentations to business stakeholders

Specific outcome 1.5: Utilise a range of electronic presentation media and visual aids to facilitate information transfer when delivering presentations to business stakeholders

2. Title : Generate electronic data to enhance retail/wholesale practices

Specific outcome 2.1: Relate software application capabilities to the format, layout and purpose of documents and reports generated in business practices

Specific outcome 2.2: Relate software application capabilities to the format, layout and purpose of documents and reports generated in business practices

Specific outcome 2.3: Process and generate a range of customer and transactional information using appropriate database/accounting software

Specific outcome 2.4: Receive and transfer information between departments and branches using electronic messaging software

Specific outcome 2.5: Store and retrieve data from computerised archival systems

3. Title : Interpret financial reports in retail/wholesale

Specific outcome 3.1: Relate the purpose of a range of financial reports to business activities performed by various departments/branches

Specific outcome 3.2: Recognise the internal sources responsible for generating financial reports and the associated deadlines for dissemination of financial information

Specific outcome 3.3: Interface with a range of financial reporting software applications installed on networked systems and extract information for interpretation purposes ensuring organisational policy on data integrity is maintained

Specific outcome 3.4: Apply a range of techniques for interpreting information reflected on financial reports and evaluate the impact of analysed results on own business area

Specific outcome 3.5: Verify accuracy and comprehensiveness of financial information and initiate appropriate actions for reconciling transactional discrepancies in accordance with departmental procedures

4. Title : Monitor flow of retail/wholesale documents

Specific outcome 4.1:	Control and monitor the collection and processing of a range of documentation reflecting information relating to cash/credit/stock transactions conducted in retail/wholesale outlets
Specific outcome 4.2:	Verify completeness and accuracy of credit applications received and monitor processes for capturing information relating to the granting of credit facilities in retail/wholesale outlets
Specific outcome 4.3:	Evaluate and consolidate processed information and monitoring distribution of a range of reports reflecting status of cash/credit/stock transactions in retail/wholesale outlets
Specific outcome 4.4:	Co-ordinate and monitor administration procedures for processing and banking payments received for cash/credit transactions in retail/wholesale outlets
Specific outcome 4.5:	Controlling and authorising the processing of documented information relating to a range of inter-departmental purchasing transactions in retail/wholesale outlets

5. Title : Monitor cash systems in retail/wholesale

Specific outcome 5.1:	Prepare denominations of money and distribute cash floats to points of sale handling cash transactions in retail/wholesale outlets
Specific outcome 5.2:	Receive and verify incoming cash flow and replenish cash floats at points of sale in retail/wholesale outlets
Specific outcome 5.3:	Monitor cashing up procedures and report transactional discrepancies occurring at points of sale in retail/wholesale outlets
Specific outcome 5.4:	Reconcile and balance cash received against payment details recorded at points of sale in retail/wholesale outlets
Specific outcome 5.5:	Prepare and secure cash and forms of payment received for depositing and collection in accordance with security procedures for retail/wholesale outlets

6. Title : Co-ordinate promotional activities

Specific outcome 6.1:	Inform sales people of concepts and objectives for promoting ranges of merchandise in retail/wholesale outlets
Specific outcome 6.2:	Mobilise activities around assembling and arranging displays in accordance with layout plans for merchandise promotions in retail/wholesale outlets
Specific outcome 6.3:	Relate product information to sales people for merchandise promotions in retail/wholesale outlets
Specific outcome 6.4:	Set a range of goals, targets and incentives to motivate sales activities during merchandise promotions in retail/wholesale outlets
Specific outcome 6.5:	Monitor ranges of merchandise to ensure stock availability during merchandise promotions in retail/wholesale outlets

7. Title : Provide customer service

Specific outcome 7.1:	Respond to customer queries and complaints by offering a range of solutions for resolving customer dissatisfaction in retail/wholesale outlets
Specific outcome 7.2:	Record telephonic queries and complaints to initiate future actions for customer dissatisfaction in retail/wholesale outlets

- Specific outcome 7.3: Negotiate with internal and external resources for providing effective solutions to customer queries/complaints in retail/wholesale outlets
- Specific outcome 7.4: Identify and alert co-workers to short-falls in product and services in retail/wholesale outlets
- Specific outcome 7.5: Update and maintain customer information using a range of data capturing processes for recording customer details in retail/wholesale outlets

8. Title : Process stock

- Specific outcome 8.1: Monitor ranges of merchandise to ensure stock availability during merchandise promotions in retail/wholesale outlets
- Specific outcome 8.2: Group source documents and record appropriate details using manual/electronic processes for capturing and generating a range of information outputs relating to stocks of merchandise in retail/wholesale outlets
- Specific outcome 8.3: Evaluate a range of criteria and determine stock replenishment requirements or stock returns to merchandise suppliers
- Specific outcome 8.4: Plan and allocate packing areas for categories of merchandise according to floor layout plans
- Specific outcome 8.5: Monitor quantity, quality and movement of stockholdings within the holistic requirements of merchandising strategy

9. Title : Sell goods and services (optional)

- Specific outcome 9.1: Implement goals and targets towards achieving professional excellence in sales of goods and services
- Specific outcome 9.2: Identify and respond to a range of customer needs and requests for goods and services offered by retail/wholesale outlets
- Specific outcome 9.3: Stimulate customer interest by demonstrating applications and features for a range of goods and services offered by retail/wholesale outlets
- Specific outcome 9.4: Extend customer service delivery by informing customers of supplementary applications and complementary features adding value to goods and services offered by retail/wholesale outlets
- Specific outcome 9.5: Acknowledge customer needs and requests by recommending alternative goods and services offered in retail/wholesale outlets
- Specific outcome 9.6: Maintain customer service by responding objectively to customer complaints or queries relating to goods and services offered by retail/wholesale outlets

10. Title : Buy merchandise (optional)

- Specific outcome 10.1: Determine buying requirements by analysing a range of factors influencing merchandise sales in retail/wholesale outlets
- Specific outcome 10.2: Source merchandise and negotiate a range of criteria for placing buying orders on selected suppliers of merchandise to retail/wholesale outlets
- Specific outcome 10.3: Determine packaging requirements for promoting new ranges of merchandise in accordance with branding strategies of retail/wholesale outlets

- Specific outcome 10.4: Monitor profitability of buying operations by analysing a range of factors influencing flow of merchandise from suppliers through to points of sale in retail/wholesale outlets
- Specific outcome 10.5: Research and analyse a range of factors for identifying and developing new product lines for retail/wholesale outlets

11. Title : Monitor credit in retail/wholesale (optional)

- Specific outcome 11.1: Evaluate and rate credit applications using a range of criteria for checking credit references of customers applying for credit facilities in retail/wholesale outlets
- Specific outcome 11.2: Inform customers of the outcome of credit applications and explain the reasons for declining credit facilities in retail/wholesale outlets
- Specific outcome 11.3: Calculate payment instalments and explain payment procedures to customers buying merchandise on credit in retail/wholesale outlets
- Specific outcome 11.4: Negotiate payment commitments and assist customers wishing to renegotiate payment terms for credit transactions in retail/wholesale outlets
- Specific outcome 11.5: Evaluate status of credit transactions and hand bad debts over to debt collectors in accordance with non-payment policies of retail/wholesale outlets
- Specific outcome 11.6: Supply customer payment record information to credit bureau's in accordance with customer credit reference procedures for retail/wholesale outlets

12. Title : Implement speciality merchandise in retail/wholesale practices

- Specific outcome 12.1: Implement and monitor stock handling procedures and packing specifications ensuring customer requirements are met and damage/breakage is controlled
- Specific outcome 12.2: Implement and monitor procedures for using and maintaining equipment in accordance with instructions and safety standards
- Specific outcome 12.3: Control stock replenishment and rotation ensuring that relevant accessories are stocked in required quantities and unseasonal or expired products are returned to suppliers or disposed of in accordance with legal requirements
- Specific outcome 12.4: Implement stock controls and monitor stock levels, evaluate display layouts/facings for leading brands and recommend alternative improvements where required
- Specific outcome 12.5: Evaluate products and services offered by a speciality outlet by implementing customer feedback systems, identify opportunities for providing value added services and organise consumer education sessions to promote awareness of speciality products and end uses
- Specific outcome 12.6: Introduce new product ranges in accordance with customer demand and overall merchandising strategy ensuring that speciality product ranges purchased conform to SABS or equivalent standards
- Specific outcome 12.7: Monitor competitor activity on KVI lines ensuring adequate stocks and visibility is maintained on KVI lines stocked in own outlet

13. Title : Implement CFTA retail/wholesale practices

- Specific outcome 13.1: Analyse and evaluate customer feedback when planning assortments and determine sizing ratios for implementing fashion trends and seasonal ranges in accordance with buying strategies for CFTA products

Specific outcome 13.2:	Source products and place orders on selected suppliers ensuring lead times and costs are aligned with buying strategies for CFTA retail/wholesale outlets
Specific outcome 13.3:	Interpret marketing plans and implement promotional packaging, ticketing and visual displays in accordance with merchandising standards
Specific outcome 13.4:	Implement and monitor packaging procedures ensuring appropriate techniques are utilised when packaging different categories of CFTA products
Specific outcome 13.5:	Implement appropriate measures for realigning stock movement with projected sales budgets and profit margins for CFTA departments
Specific outcome 13.6:	Implement standards and manage a range of merchandising processes for departments in CFTA retail/wholesale outlets
Specific outcome 13.7:	Monitor stock levels, sell-off rates and store profiles for ensuring CFTA products stocked are in accordance with consumer demand

14. Title : Implement furniture and appliance retail/wholesale practices

Specific outcome 14.1:	Compile contact lists utilising a range of resources for collecting information and evaluate FAB sheets for planning sales pitches and products/services presentations to prospective customers, arrange appointments and extend courtesy transport services to bring prospective customers to furniture/retail outlets
Specific outcome 14.2:	Obtain a range of information from customers for identify needs and establish customer profiles, inform customers of a range of product features/add-on benefits and demonstrate product uses to actively promote sales of furniture and appliances
Specific outcome 14.3:	Advise customers of a range of hire purchase terms and associated services, negotiate trade-in deals, calculate and inform customers of payment instalments when finalising deals for furniture/appliances purchased on credit
Specific outcome 14.4:	Plan and schedule deliveries and allocate work teams for loading and off-loading furniture/appliances, reconcile delivery documentation and implement courtesy call systems for obtaining customer feedback on deliveries and monitor after-sales support services
Specific outcome 14.5:	Implement floor layout plans for assembling furniture displays and recommend colour co-ordinations and accessories to enhance displays ensuring payment terms are prominently displayed and promotional material is available at points of sale
Specific outcome 14.6:	Monitor procedures for receiving, securing, maintaining and delivering stocks of furniture/appliances ensuring that all requirements and precautions for large or custom made furniture/appliance orders are met
Specific outcome 14.7:	Place consignment orders with suppliers and monitor work in progress/ status of "non-standard" orders and provide feedback on test results of new stock lines ensuring ongoing communication between suppliers and furniture/appliance outlet
Specific outcome 14.8:	Monitor a range of existing customer record information for identifying opportunities for securing additional sales of products and services and advise existing customers of current promotions, negotiate with second-hand dealers and auctioneers on resale prices for customer trade-ins, reposessions and discontinued
Specific outcome 14.9:	Implement training sessions for informing delivery staff and factory representatives of new product specifications, enhanced features and benefits ensuring up to date product and service knowledge is maintained in all areas of the business

15. Title : Implement food handling retail/wholesale practices

Specific outcome 15.1:	Implement stock controls and monitor storage and preparation areas in food handling retail/wholesale outlets
Specific outcome 15.2:	Implement packaging specifications and monitor packing operations ensuring correct packaging materials and techniques are applied
Specific outcome 15.3:	Implement quality standards and negotiate with suppliers when resolving quality problems with perishable food products and packaging in food handling retail/wholesale outlets
Specific outcome 15.4:	Control temperatures of refrigerators and perishable food environments ensuring cold chain principles are adhered to in food handling retail/wholesale outlets
Specific outcome 15.5:	Develop and control cleaning rosters ensuring hygiene standards are maintained
Specific outcome 15.6:	Implement and monitor production schedules ensuring food preparation and recipes are adhere to in food handling retail/wholesale outlets.
Specific outcome 15.7:	Complete log books and check accuracy of scales and other equipment in accordance with food handling equipment maintenance standards.

**NATIONAL DIPLOMA IN RETAIL AND WHOLESALE, PRODUCT AND SERVICE
MANAGEMENT TECHNOLOGY**

Field	:	Services
Sub-field	:	Retail and Wholesale
NQF Level	:	5
Credits	:	240

Purpose of qualification

This qualification is registered at level 5 of the National Qualifications Framework. Learners acquiring this qualification will demonstrate competence across areas including cash and credit, stock management, customer service policy, merchandising policy and promotion strategies. Learners will also demonstrate competence against standards registered in the business, commerce and management studies field of learning where they will be able to manage the performance of people, manage operational aspects of stores, manage recruitment, selection and induction of people and manage financial issues.

Learners will have a choice of elective areas where they will be able to *develop and enhance retail and wholesale practices* in either:

- Clothing, textiles, footwear and accessories.
- Furniture and appliances.
- Food handling.
- Other speciality areas, which will be enhanced as the needs in retail and wholesale, emerge.

The fundamental learning which learners will acquire will allow them to be able to influence retail and wholesale stakeholders, write business reports and manage integrated data.

**UNIT STANDARDS FOR RETAIL AND WHOLESALE, PRODUCT AND SERVICE
MANAGEMENT TECHNOLOGY**

Unit standards at NQF Level 5

1. Title : Influence stakeholders in retail/wholesale practices
2. Title : Manage integrated data in retail/wholesale practices
3. Title : Write business reports in retail/wholesale practices
4. Title : Manage cash and credit transactions
5. Title : Manage merchandise policy
6. Title : Develop and implement promotion strategies
7. Title : Develop customer service policy
8. Title : Manage stock
9. Title : Enhance and develop furniture/appliance retail/wholesale practices
10. Title : Enhance and develop speciality merchandise retail/wholesale practices
11. Title : Enhance and develop CFTA retail/wholesale practices
12. Title : Enhance and develop food handling retail/wholesale practices

UNIT STANDARDS FOR RETAIL AND WHOLESALE, PRODUCT AND SERVICE MANAGEMENT TECHNOLOGY

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES NQF LEVEL 5

Unit standards at NQF Level 5

1. Title : Influence stakeholders in retail/wholesale practices

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| Specific outcome
1.1: | Identify the roles and interests of a range of stakeholders and the impact of these relationships on business practices |
| Specific outcome
1.2: | Apply a range of techniques for building and maintaining positive stakeholder relationships in business practices |
| Specific outcome
1.3: | Apply a range of techniques for influencing stakeholders across a range of contexts where a positive response is required to meet the needs and aspirations of business practices |

2. Title : Manage integrated data in retail/wholesale practices

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| Specific outcome
2.1: | Establish information needs of the business and identify sources responsible for processing and generating information specific to requirements |
| Specific outcome
2.2: | Apply techniques for interfacing with appropriate information systems to facilitate comprehensive and expedient retrieval of information |
| Specific outcome
2.3: | Apply techniques for consolidating, analysing, auditing and querying information utilising appropriate software applications and tools |
| Specific outcome
2.4: | Apply techniques for manipulating integrated data into graphical formats to facilitate data comparison and interpretation of statistical information |
| Specific outcome
2.5: | Develop and implement procedures and controls for verifying the accuracy and authorising the release of integrated data for distribution to departments/branches in business practices |
| Specific outcome
2.6: | Apply techniques for using the Internet as an additional information source for adding value to the information requirements of the business |

3. Title : Write business reports in retail/wholesale practices

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|--------------------------|---|
| Specific outcome
3.1: | Relate the purpose and content of a range of reports to the information needs of business |
|--------------------------|---|

- Specific outcome 3.2: Specific outcome 3.2: Recognise appropriate information resources and organisational procedures for obtaining and distributing confidential information
- Specific outcome 3.3: Apply a range of techniques for compiling reports, ensure content and format are appropriate to information requirements and that reporting deadlines are met
- Specific outcome 3.4: Liaise with relevant parties and verify reported information is in accordance with requirements, compiling and distributing additional commentary/information where required

4. Title : Manage cash and credit transactions

- Specific outcome 4.1: Control cash float procedures at start of day and authorise cash transactions during trading hours in retail/wholesale outlets
- Specific outcome 4.2: Supervise end of day cashing up procedures, arrange and monitor the collection of cash pick-ups in retail/wholesale outlets
- Specific outcome 4.3: Audit cash reconciliation processes for transactions recorded at points of sale in retail/wholesale outlets
- Specific outcome 4.4: Design credit risk plans and a range of supporting documentation for credit granting processes in retail/wholesale outlets
- Specific outcome 4.5: Implement credit monitoring systems using a range of techniques for evaluating the status of credit transactions in retail/wholesale outlets
- Specific outcome 4.6: Measure success of credit granting facilities using a range of techniques for reviewing overall credit strategies of retail/wholesale outlets

5. Title : Manage merchandise policy

- Specific outcome 5.1: Design and implement short and long term merchandising strategies using a range of techniques for monitoring market share of retail/wholesale outlets
- Specific outcome 5.2: Control a range of logistical and distribution processes ensuring alignment with merchandising standards for retail/wholesale outlets
- Specific outcome 5.3: Plan, implement and monitor a range of financial controls for maintaining profitability of merchandise flow in wholesale/retail outlets
- Specific outcome 5.4: Establish and maintain supplier relationships for expanding negotiating opportunities for retail/wholesale outlets
- Specific outcome 5.5: Research and analyse local and international trends for identifying product lines and promotional opportunities for retail/wholesale outlets

6. Title : Develop and implement promotion strategies

- Specific outcome 6.1: Apply a range of internal and external research techniques for identifying target markets for merchandise promotions in retail/wholesale outlets
- Specific outcome 6.2: Identify a range of cost-effective tools for promoting merchandise in retail/wholesale outlets
- Specific outcome 6.3: Select a range of internal and external specialists for designing and implementing promotional concepts in retail/wholesale outlets
- Specific outcome 6.4: Develop a range of performance standards for measuring success of merchandise promotions in retail/wholesale outlets

- Specific outcome 6.5: Inform sales staff of promotion outcomes and establish future benchmarks for merchandise promotions in retail/wholesale outlet
- Specific outcome 6.6: Integrate analysis of internal promotion trends into long-term research strategies for future merchandise promotions in retail/wholesale outlets

7. Title : Develop customer service policy

- Specific outcome 7.1: Evaluate customer feedback and implement changes to improve service delivery in retail/wholesale outlets
- Specific outcome 7.2: Extract and interpret a range of customer feedback data to monitor customer service delivery in retail/wholesale outlets
- Specific outcome 7.3: Implement a range of policies and procedures for customer service in retail/wholesale outlets
- Specific outcome 7.4: Mobilise resources using a range of techniques for equipping sales staff to provide effective service delivery to customers in retail/wholesale outlets
- Specific outcome 7.5: Implement a range of safety and comfort standards for customers in retail/wholesale outlets

8. Title : Manage stock

- Specific outcome 8.1: Control and monitor merchandise stockholdings using a range of techniques for evaluating stock levels and minimising stock shrinkage in retail/wholesale outlets
- Specific outcome 8.2: Implement a range of measures for improving merchandise flow and minimise excess levels of merchandise stockholdings in retail/wholesale outlets
- Specific outcome 8.3: Audit administration procedures for processing and capture a range of stock information ensuring accuracy and ongoing maintenance of stock records in retail/wholesale outlets
- Specific outcome 8.4: Monitor and control a range of stockholding activities relating to receiving, dispatching and preparing of merchandise for promotion and resale in retail/wholesale outlets
- Specific outcome 8.5: Monitor, analyse and report on a range of factors influencing performance and profitability of stockholdings in retail/wholesale outlets

9. Title : Enhance and develop speciality merchandise retail/wholesale practices

- Specific outcome 9.1: Develop merchandising strategies for promoting seasonal merchandise and products considered to be part of a trend and providing a range of "add on" services in accordance with latest technology trends and best retail/wholesale practices to enhance customer access to speciality merchandise and promote ongoing customer satisfaction
- Specific outcome 9.2: Research and analyse a range of factors influencing the development of merchandise buying strategies and present results/recommendations to relevant role players for effective implementation of merchandising processes
- Specific outcome 9.3: Determine future stock levels by evaluating stock movement indicators and adjust merchandising plans in accordance with stock movement and current sales trends of speciality product departments

Specific outcome 9.4: Conceptualise promotional plans, packaging and displays for new ranges of speciality merchandise within your speciality category and develop procedures/standards for assembling and laying out visually effective speciality goods displays to stimulate customer interest and promote sales

10. Title : Enhance and develop furniture/appliance retail/wholesale practices

Specific outcome 10.1: Research local and international trends in furniture/appliance products and services to identify new opportunities for improving existing ranges and analyse customer hit rate results for evaluating success of current merchandising strategies

Specific outcome 10.2: Analyse stock budget "open to buy" figures and conduct a comparative analysis of current stockholdings against recent sales trends for identifying good sellers and determining best value buys for forthcoming season

Specific outcome 10.3: Identify suitable suppliers and negotiate terms and lead times when placing direct orders, prescribe required colours and designs and arrange sample product testing in stores

Specific outcome 10.4: Liaise with customers and establish requirements for custom made furniture/appliances and manage progress of non-standard orders placed with suppliers ensuring customer requirements are met within stipulated deadlines

Specific outcome 10.5: Develop promotional strategies for seasonal lines of furniture and appliances and present promotional concepts to parties responsible for developing design and layout of promotional material

Specific outcome 10.6: Develop end of range mark-down sale strategies for moving excess stock, approve "on behalf of" deliveries for other branches ensuring stocks are maintained in accordance with customer demand and company stockholding policy

Specific outcome 10.7: Develop cash handling procedures and manage the securing and collection of cash deposits, evaluate customer records to determine bad debt levels and authorise pick-up notes for repossessing furniture and appliances from defaulting customers

Specific outcome 10.8: Register final demands for repossessing goods, complete voluntary documentation for motivating repossession actions against defaulting customers and plan disposal of repossessed goods to minimise financial loss

11. Title : Enhance and develop CFTA retail/wholesale practices

Specific outcome 11.1: Analyse and interpret a range of strategic factors influencing development of CFTA merchandise buying strategies

Specific outcome 11.2: Develop and present CFTA merchandising strategies to relevant role-players ensuring effective implementation of merchandising processes

Specific outcome 11.3: Develop a range of CFTA stock movement indicators for determining future stock levels

Specific outcome 11.4: Manage and adjust CFTA merchandising plans in accordance with stock performance indicators and current sales trends in merchandising departments

Specific outcome 11.5: Conceptualise and develop CFTA marketing, packaging and display plans for ranges of merchandise being promoted

Specific outcome 11.6: Develop CFTA procedures and standards for merchandise displays across retail/wholesale chains

12. Title : Enhance and develop food handling retail/wholesale practices

Specific outcome 12.1:	Develop delivery and production schedules for managing production and rotation of perishable food stock in food handling retail/wholesale outlets
Specific outcome 12.2:	Develop strategies for disposing food wastage, identify potential hazards and maintain records reflecting compliance with and food safety standards
Specific outcome 12.3:	Develop policies and procedures for implementing and maintaining cold chain processes in food handling retail/wholesale outlets
Specific outcome 12.4:	Implement and manage hygiene and quality control standards in accordance with food safety/hygiene legislation
Specific outcome 12.5:	Select and develop food preparation recipes for enhancing quality and shelf-life of perishable products
Specific outcome 12.6:	Research and analyse local and international trends for packaging perishable food products enhancing presentation and merchandising strategies of food handling retail/wholesale outlets lines of furniture/appliance stock