Learning Work Book to Contribute to the Achievement of the Underpinning Knowledge for Unit E19 in Retail NVQ at Level 2

www.thelearningcompanyuk.com
**INTRODUCTION**

Welcome to this individual learning book to contribute to the underpinning knowledge for your chosen qualification.

This workbook will contribute to your achievement of the underpinning knowledge for your chosen NVQ unit. Awarding body rules stipulate that all learners must gather evidence from diverse sources. This means that you may cover all of the underpinning knowledge by using this book but you and your tutor/assessor will need to gather other forms of evidence such as observed activity to ensure you meet the awarding body requirements.

The Learning Company UK. Com Ltd has licensed this book to your training provider for them to use to support your chosen qualification; your training provider is responsible for assessing this qualification. Both your training provider and your awarding body are then responsible for validating it.

There are no grades, only pass or not yet achieved. To obtain a pass, you must achieve all of the learning outcomes for each unit. Your qualification may contain mandatory units and optional units. The number of mandatory and optional units varies dependant on your chosen qualification. You must complete all of the indicated mandatory and optional units to receive your full certificate. You may wish to complete and receive certain units, this is called the unitised approach and you can receive a certificate for each unit you achieve. If you wish to take advantage of the unitised approach please discuss this with your training provider.

On completion of all of your required units, your Internal Verifier will advise you if you have passed or if your units do not yet meet the requirements of the standards and awarding body. If this happens, you will be advised of what to do next.
THE STUDY PROGRAMME

This qualification is open to everyone, irrespective of colour, race, nationality, ethnic or national origin, gender, sexual identity, marital status, disability or spent convictions. The units, which make up the study programme that lead to the qualification, are designed for those who wish to pursue a career in their chosen sector, whether experienced or not. They provide a valuable, detailed and informative insight into that sector and are an interesting and enjoyable way to learn.

The study programme will increase your knowledge and abilities in your industry and help you to become more confident, by underpinning any practical experience you may have with sound theoretical knowledge.

WHERE TO STUDY

You can study at home, in work, during a break, the books are designed for you to be able to pick them up and study at a time which is convenient to you.

WHEN TO STUDY

It is best to study when you know you have time to yourself, do set some realistic targets with your tutor/assessor, they will agree when work and units will need to be signed off. Your tutor/assessor will also inform you of when they will next be visiting or assessing you so it is essential that you keep to the agreed deadlines and so keep on track to achieve your qualification in a timely fashion.

HOW TO STUDY

Your tutor/assessor will agree with you the order for the books to be completed; this should coincide with the other assessments being undertaken. Your tutor/assessor will discuss each book with you before you attempt it, they will explain the book’s content and the assessment they will conduct on your book once you have completed it. They will also advise you of the sort of evidence they will be expecting and how this will map to the underpinning knowledge of your chosen qualification. You will also have a mentor appointed, this should normally be a line manager who can support you in your
tutor/assessor’s absence; they will also confirm and sign off your evidence.
You are advised to ensure you have received adequate information, advice and guidance from your tutor/assessor before embarking on a book. If you are experienced within your job and familiar with the qualification process your tutor/assessor may agree that you can attempt books without the detailed information, advice and guidance.

THE UNITS
Each unit begins by identifying the requirement for that unit, it explains the knowledge and skills you will need and what you will have achieved by the end of each unit.
Within each unit, there is a learner details page at the front, please ensure you fill all of the details in, this will help when your books go through the verification process and ensure your books can be returned to you safely. If you do not have all of the information, e.g. your learner number, ask your tutor/assessor and they will supply this for you.

To begin you should read all of the text on each page. You will come across multiple choice questions that are identified as activities. These activities do not count towards your qualification but are designed to check you have learnt form the text you have just read.
You will see small sections of text called “it’s a fact” these are interesting snippets and facts designed to keep you interested and to help you enjoy the book and your learning.

At the rear of each book you will come across a section entitled assessments; these are how you will prove that you have the knowledge and understanding for your chosen qualification, they are
designed to assess your learning, knowledge and understanding and will prove that you have completed all of the learning outcomes.

Each Unit should take you about 3 hours to complete, although some will take longer than others. The important thing is that you understand and learn.

**YOU WILL RECEIVE HELP AND SUPPORT**

The books are designed for you to work through on your own, in your own time. However, we all need help and guidance from time to time, to help you your tutor/assessor will provide this support. Make sure you make an appointment each time your tutor/assessor visits you to discuss your progress.

If you have colleagues doing the same programme, it could be very useful to talk to them as well.

**CERTIFICATION**

As you complete each book, your mentor will check your work. Your mentor and assessor will sign off each unit before you move on to the next unit.

When you have completed all of the required books and units, your assessor will submit your work to the Internal Verifier for validation. If it is validated, your training provider will then apply for your certificate. Your provider will send your certificate to you shortly after completion; this is usually within 8 weeks.
This unit is about two aspects of being an effective team member. The team could be just you and your manager.

The first aspect is about working with colleagues to achieve results together. It is about managing your time effectively and getting along with colleagues in the workplace.

Secondly the unit is about your responsibility for learning new information and tasks at work, with the help and guidance of your manager or trainer.

You need to follow your training programme and work out which ways of learning and remembering tend to work best for you.

**First what is a team?**

A team in its truest form is not a group; groups are more likely to be a gathering of individuals with individual objectives.

A team is defined as ‘a number of people who are organised or who organise themselves to function co-operatively as a group’. So, what is the difference between a team and a group? Belbin stated some of the differences as follows:

<table>
<thead>
<tr>
<th>Factors that affect teams or groups</th>
<th>Teams can have or be</th>
<th>Groups can have or be</th>
</tr>
</thead>
<tbody>
<tr>
<td>The team size</td>
<td>Limited</td>
<td>Unlimited</td>
</tr>
<tr>
<td>The teams leadership</td>
<td>Consultative</td>
<td>Dogmatic or absent</td>
</tr>
<tr>
<td>Disagreements</td>
<td>Welcome</td>
<td>Not welcome</td>
</tr>
<tr>
<td>Recruitment</td>
<td>Hand picked</td>
<td>You arrived and there they were</td>
</tr>
<tr>
<td>Team Goals</td>
<td>Common and agreed</td>
<td>Self interest</td>
</tr>
</tbody>
</table>

Meredith Belbin, Barrie Watson [www.belbin.co.uk](http://www.belbin.co.uk)
Teams are brought together for a common purpose. This may be to run a retail store or a section within a retail store. The team may be involved in regular work activity or a one-off project like changing displays.

Team members are selected to do specific jobs within the team, but also to contribute to the achievement of other goals being carried out by the team as a whole.

A supervisor, team leader or manager gets the best out of his team by creating the right environment for all members of the team to be successful. Good managers will involve the team in the decision making. The team’s views are taken into account before decisions are made. These decisions form common goals and objectives for the team.

You will probably be a member of several teams all at once, you could be part of the departmental team, the store team, the regional team, the nationwide team and the global team.

You will also need to work with other teams within the organisation. For instance there may be people whose job it is to prepare stock for delivery to customers; people who work on the cash desks; people who work in the canteen who make sure you get your lunch. Cooperation between the teams is important if the organisation as a whole is to function effectively.

Newly formed teams are unlikely to work as effectively to start with. Members of the team need to get to know each other and find ways of working together. When the team has been together for some time they will begin to be successful as a team and deliver goals and objectives effectively. The output of the team will be greater than the individuals could produce alone. This can be shown as:
1 + 1 = 3

This might not add up mathematically, but this shows how teams deliver a greater output than individuals working independently.

Each team member will have their own strengths and weaknesses. The trick is to recognise both your own and everybody else’s.

**Communication is the key**

Did you know that at most you will only ever absorb 30% of what is going on around you, this includes;

- What you see
- What you hear
- What you feel.

People absorb information in different ways, have you ever known anyone at school, in your family, at work who when you meet and talk with them you feel as though you are not quite on the same wavelength?

Have you heard or said any of the following phrases:

- You’re not listening to me
- Can’t you see what I’m saying?
- Do you not feel...
- I don’t see it that way.

Sometimes at work people are told or shown things but they just don’t get what was said and so they do the job wrong.

It’s not their fault sometimes when this happens; we all receive and process information and communication in different ways. Below is a small questionnaire to find out how you best process

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**Questionnaire**

1. What do you do when you feel someone is not listening to you?
2. What do you do when you feel someone is not understanding you?
3. How do you ensure that everyone understands what you are saying?
4. What are some strategies you use to improve communication with team members?
information and communication. Fill it out; why not get your colleagues to fill it out also?

The questionnaire is not a test, it will establish how you best receive information and communication, do not ponder the questions, you can only indicate one of the 3 answers.

When you have completed the questionnaire, count up the numbers of A, B, and C answers you have.

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**VHF Communication Channels questionnaire**

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Read each question in turn and circle one answer for each answer that applies to you.

1. **What would make you suspect that someone was lying?**
   a. The way they look at, or avoid looking at you.
   b. The tone of their voice
   c. A feeling you get about their sincerity.

2. **How would you know that you have had a good day at work, school or home?**
   a. A productive meeting, class or good news over the phone
   b. A clear desk or “things to do list” with everything ticked off
   c. An inner glow, a smile and an inner feeling of deep satisfaction.

3. **What kind of activity do you prefer doing on holiday?**
   a. Lazing on the sun drenched beaches, swimming to cool off
   b. Attending a concert or a lecture on local culture and history
   c. Seeing the sights and local colour, visiting a museum or art gallery.

4. **Which of the following groups of hobbies/interests appeals most to you?**
   a. Cinema, photography, art, interior design
   b. Sport, sculpture, cookery, gardening
   c. Playing a musical instrument, listening to music or a taped book, singing.
5. Which TV programme would you prefer to watch?
   a. A wildlife programme
   b. A programme about painting or art
   c. A pop/classical concert.

6. Which would you prefer for a celebratory treat?
   a. A personal dedication on the radio
   b. A weekend break to somewhere you have never visited before
   c. Your favourite meal with good wine and good company.

7. Which would be the best way for you to unwind at the end of a trying day?
   a. Gaze at something relaxing such as a candle flame
   b. An aromatherapy massage
   c. Talk to a friend.

8. If you were to thank or reward someone for doing you a favour, which of these would you do?
   a. Telephone them
   b. Give them a bottle of wine/chocolates/perfume/flowers
   c. Write them a thank you note.

9. Which of the following groups of careers would most appeal?
   a. An artist, or designer in television
   b. Lecturer, telesales or customer liaison
   c. Gardener, nurse or counsellor.

10. Which accessories do you like to have in your home?
    a. Chiming clock, wind chimes
    b. Lots of pictures, accent-lighted
    c. Pot pourri, soft cushions.

11. Which magazines would you be most likely to pick up?
    a. DIY, sports or creative crafts
    b. Music or current affairs
    c. National Geographic or Vogue.

12. How would you discipline a naughty child?
    a. A piercing look or frown
    b. Punishment by deprivation: for example, no pocket money
    c. Shout or use a stern tone or voice.
Add up your scores by letter and record below

a) .................. (Visual )

b) .................. (Hearing )

c) .................. (Feeling )

What you have just discovered in the results of this simple questionnaire is how you are programmed to receive and absorb information.

On average people who come out with a leaning towards Visual represent just 20% of the population. Both hearing and feeling come out even at 40% of the population each.

What this means in terms of communication is that those that are Visual do not absorb information and instruction when they are told about something. When a person from the hearing pool wants to instruct someone from the visual pool they will tell them, this is bad news for the visual people amongst us as 80% of the population will prefer to do it another way!

You can use this information to great effect in a team if you know how someone prefers to absorb information; it will help to stop conflict in groups by allowing others to understand each other.

Hopefully you will not hear things like:

- You’re not listening to me!
- Do you not see what I’m saying?
- I feel that you don’t understand me!

Communication is the key to working in a team. When things are not going well, criticism will not help. People don’t usually do things badly by choice. Encouragement is much more likely to have the desired effect. Use the three E’s:

- Encouragement
- Enjoyment
- Enthusiasm.
Don’t forget people do not respond to people having a go at them, they will respond to the three E’S.

**ACTIVITY ONE**

According to Meredith Belbin there are a number of differences between teams and groups. Circle any of the below which relate to teams.

- Limited
- Consultative
- Common
- Agreed
- Dogmatic
- Chosen
- Unlimited
- Absent
- Welcome
- Self-interest

**Team Working**

When you work in a team, you are responsible for your own:

- Actions
- Behaviour
- Effort
- Capabilities
- Beliefs.

Although there is no ‘I’ in team, you are responsible for carrying out your own tasks effectively.

Your main priority in retail will always be to ensure that the customers are served politely and efficiently. Even if you do not look after customers personally, how you do your job affects the customer. Such things as ensuring that there is stock available, that displays are full and are priced, cash registers are open and have sufficient
carrier bags etc. and the whole shop is clean, well presented, safe and secure.

Each day you will be expected to carry out any number of jobs, these may be routine or one off jobs, these may include:

- Operating a till
- Cleaning shelves
- Taking in deliveries
- Sweeping floors
- Replenishing stock
- Ordering stock
- Checking delivery notes
- Serving customers
- Getting deliveries ready for despatch
- Carrying out temperature checks
- Rotating stock
- Tidying the stockroom
- Stock counts.

**Keeping Track of Your Daily Tasks**

At the beginning of the day you will need to know what jobs need doing that day. Prioritise the jobs but remember that the first priority must always be to ensure that the customers are served politely and efficiently. Always be aware of customers around you and ensure you stop what you are doing if a customer needs you.

Completing tasks to deadlines is vital in a retail setting, you will have jobs that are critical, filling up the change in the till, completing temperature checks, filling up displays are all vital for the company if you are to maintain sales and ensure you deliver excellent customer service. You will be responsible for ensuring you meet the deadlines for completing these tasks.

You will need to plan your work with the rest of the team so that you are not all off the shop floor at the same time, or all on the shop floor when there are no customers. Lunches and breaks need to be organised so that there is the maximum number of staff available on the shop floor at the busiest times of the day.
Help and Information from Colleagues

At times you will need to ask for help or information from your colleagues. You can increase your knowledge of the products your company sells by reading labels and information sheets, although it is unlikely you will know everything about every product that your company sells. Never give incomplete or inaccurate information to the customer, ask a colleague who may have more knowledge than you, this way you are ensuring your customer gets the information they need.

If a customer is waiting for the information, let them know what you are going to do, don’t just leave them without explaining what you are doing; you can say; “oh, I’m not sure, but I have a colleague who will know, I will just be a minute, would you like to continue to browse and I will come and find you with the information”.

There are right and wrong ways to ask for information. It’s better to ask than not. Asking will both get you the information that you need and also help you increase your knowledge so that you don’t need to ask again.

For instance: ‘Do we sell multi sockets for scart leads?” will get a response of ‘On the shelf by the till’. This will not only enable you to get the product for the customer, but you will know where it is in the future.

There are right and wrong ways to ask for help. Be polite, but you must also explain clearly what you want. This way the person you ask may be able to suggest an alternative. For instance: ‘Can you help me carry this TV to the customer’s car please?’ may get a response of ‘It’s better to ask the customer to come to our loading bay, there will be less risk of damage.”

Help has to be given and not just taken. Colleagues will be asking for your help from time to time too. You should always try to respond positively to requests for help, but it is important not to put completion of your own tasks at risk.
Giving Help and Information to Colleagues

If a colleague asks for your help, first consider which task is more important, yours or the one your colleague is asking for help with. Remember that customer service must always take priority over other tasks. You might want to agree to every request, for a quiet life, or to feel popular, but in the long term you will be creating problems for yourself. If you decide that you cannot help on this occasion, be careful to explain your reasons. If you can do this, your colleague will understand and it will not cause any bad feelings.

A more effective way of giving colleagues a good impression is by offering to help, without being asked, when you can see that a colleague has tasks that cannot be left until later, but you are aware that they need help, offer it. This will store up some goodwill for those occasions when you either need their help, or are unable to help them when asked.

Peace and Harmony

Your colleagues may be from different age-groups and different cultures. They will certainly have different skills. Think about the questionnaire we completed earlier, not only do we absorb information differently; we like to be treated differently as well. You may need to adjust the way you speak to them to fit their individual personalities. This doesn’t mean not being natural, it just means thinking about who you are speaking to and how they will respond.

Resolving Conflict

If you find yourself coming into conflict with a colleague, try to resolve it by speaking to them personally. Find out what exactly is the problem; try to agree a solution that is acceptable to you both. Only if you are unable to resolve the problem should you go to a third person for help, this will probably be your supervisor or manager, you should tell the person you are having problems with that is what you are going to do.
If a colleague is upset with you, don’t get annoyed, think of how you would feel in their position. Listen to them and try to resolve it by speaking to them.

If you take the problem to your supervisor or manager, they should be in a position to mediate between the two of you and suggest a solution. Both of you must then accept their decision and try to work constructively.

If you behave positively while you are at work you, your colleagues and customers will be affected by your attitude:

- You will be seen as a valued member of your team
- Everybody will do their fair share of the work
- Customers will be positively impressed
- You will enjoy your work more
- You are more likely to progress.

**Mirroring**

Mirroring is an effective way to make some one comfortable, if the person stands sideways on to you whilst you are communicating, mirror them, without them knowing this will make them comfortable because it is what they feel comfortable doing.

**Pacing and Leading**

Mirroring is very successful when dealing with difficult people and situations, it allows you to get on the same wavelength as the person, once you have achieved this you can use another technique called pacing and leading, this is where you have mirrored the person and they have responded, now you change your body language and hey presto they will follow. You can take an angry customer and mirror them then pace them by setting the pace and the way they behave, you will discover that they will follow you, now you can lead them into a more relaxed and submissive behaviour. These techniques take some practice, it is always a good thing to try them out and experiment first, try them at home with your parents, kids and friends, don’t tell them what you are doing just try and experiment and very quickly you will see the results.
**DID YOU KNOW?**
Trademarks apply not just to names, but also to logos, drawings and other symbols and depictions. The MGM lion, for instance, is a trademark.

**ACTIVITY TWO**

Circle the following tasks which you could reasonably expect a new member of staff with little training to successfully complete?

- Putting stock out
- Tidying the stockroom
- Pricing stock
- Ordering stock
- Unloading deliveries
- Cleaning
- Checking deliveries
- Rotating stock
- Stock counts
- Carrying out temperature checks
- Changing displays

**Discrimination, Harassment and Bullying**

Discrimination can be defined as ‘unfair treatment of one person or group, usually because of prejudice about race, ethnic group, age group, religion, or gender’.
Harassment can be defined as ‘persistently annoying, attacking, or bothering somebody’.

Bullying can be defined as ‘the process of intimidating or mistreating someone weaker or in a more vulnerable situation’.

There is a variety of legislation which makes it unlawful to discriminate on the grounds of someone's sex, sexual orientation, status as a married person or a civil partner, race, colour, nationality, ethnic origin, religion, beliefs or because of a disability, pregnancy or childbirth, or subsequent maternity leave or because they are a member or non-member of a trade union. It is also unlawful to discriminate against part-time workers.

New legislation, effective from 1st October 2006, makes it unlawful to discriminate on grounds of age against those in and seeking employment and vocational training.

**DID YOU KNOW?**
Every business wants to create a product that will dominate its market. However, if the product is so successful that the brand name becomes indistinguishable in the public mind from the product itself, this can be counterproductive.
This happened, for example, when people begin to ask for a hoover rather than a Hoover brand of vacuum cleaner. The brand name became generic and Hoover faced the loss of its trademark protection.
ACTIVITY THREE

Circle the words below which refer to discrimination.

Unfair treatment  Age groups  Annoying  
Gender  Ethnic groups  Mistreatment  
Attacking  Race  Bothering people  
Intimidation  Prejudice  Religion

Company Policies

Every organisation must comply with the legislation. Some will have company policies which go further. You should know your company policy on these issues.

Another issue that it is vital that you know and understand your company’s policy and procedures for is Health and Safety. The workplace must be safe and as far as possible promote the health of both staff and customers. Any organisation with more than five employees must publish a Health and Safety policy which should include:

- An outline of the policy
- Steps to be taken to fulfil the policy
- The legal responsibilities of employer and employees
- Information on training opportunities
- Information on how the policy will be displayed
- Plans to review and revise the policy
- Details of any relevant Codes of Practice
- Procedures for reporting accidents
- Names of those responsible for health and safety
- Reference to the organisation’s rules on health and safety.
It is as much your responsibility as everybody else’s to look out for potential hazards and to observe safe working practices.

**DID YOU KNOW?**
Thermos and Hoover are two brands that have, in one way or another, suffered the loss of trademark protection. That is why advertisements sometimes include faintly paranoid-sounding statements like “Tabasco is the registered trade mark for the brand of pepper sauce made by McIlhenny Co.”
ACTIVITY FOUR

Circle the items below which must be included in a Health and Safety policy.

- Legal responsibilities
- Number of first aiders
- Position of the first aid box
- Codes of Practice
- Rules on health and safety
- Accident reporting
- Emergency telephone number
- Telephone number for doctor
- Training opportunities
- Outline of policy

Personal Development

Congratulations; the very fact that you are reading this shows that you are keen to develop yourself.

- Do you know what your goals are?
- How hard you are prepared to work to achieve them?
- Do you know whether you are happy to stay in the job you have?
- Are you prepared for the additional responsibility which would come with promotion?

If you work for a company with structured training there will be people whose job it is to help and encourage you to make the most of your abilities and the opportunities within that company. If you work for a small business or one which has no structured training, it will be very much up to you to fulfil your potential.

Many companies will have an annual review system. This is a formal chance to sit down with your supervisor or manager and discuss:

- Last year’s review targets
- Your present performance
- The targets you have met
- The targets you have failed to meet
Your strengths and weaknesses
Timekeeping
Your attitude and behaviour
Your contribution to the team’s performance
Your training and development needs
Your potential for advancement.

DID YOU KNOW?
In 1993, according to an international business survey, the world’s most valuable brand was Marlboro, with an estimated value of 40 billion dollars.

ACTIVITY FIVE

Circle the words below that refer to areas that would be covered on an annual review.

Bonuses         Pay rises         Training needs
Holiday dates   Development      Lieu time
Advancement     Strengths        Pensions
Tea breaks      Weaknesses       Performance

Reviews and Appraisals

A review should be planned in advance; you should know when and where it will take place. You should be asked to gather information, feedback or data relevant to your review.

Some simple rules for reviews:

- Plan them in advance
- Give one month’s notice to all parties
- Conduct them in a relaxing environment
- Ensure there will be no interruptions
 Allow plenty of time for the review
 Ensure you have all of the relevant information at hand for last year’s and this year’s review.
 Reviews should be objective, based on performance or critical incidents
 Reviews should not be subjective, i.e. not what someone thinks about you.

Many companies use KPI’s (key performance indicators) in reviews, these are clear and precise sets of information or data or performance. The information and data (KPI’s) should be gathered during the year and not just the last couple of weeks. When you are in a review you should not get any nasty shocks as you will have been told about your KPI’s during the course of the year. When your KPI’s are gathered during the year you should be given feedback to help you recognise and improve on weaknesses.

If your company does not operate a formal appraisal system it is a good idea to ask for feedback throughout the year. It is very easy to go along thinking that you are doing well if you never receive any comment, or to worry that you may not be meeting your boss’s standards if you never receive a word of encouragement.

Many retailers now use 360° feedback; this is where you supply a questionnaire to one of your colleagues, a supervisor and a manager. This then gives you a balanced view of your performance from all angles.

Your review will be documented and you will discuss your performance and areas where you agree that you need to develop, these will be made into objectives or targets to be reviewed throughout the next year and at your next annual review.

Most companies will add their own objectives to your overall action plan, this is so your company can achieve their business plan and objectives.

One way of doing this is by using a balanced score card, this is a grid with 4 boxes on it, and your employer will put their business objectives into these 4 boxes.
The boxes have 4 titles, these are:

- Financial
- Customer
- Process
- Staff.

These titles within the boxes then have the targets a company wants to achieve listed in each box. This might look like this:

**Company.** Sean’s Supermarket.  
**Completed By.** J. Nackamura.  
**Title.** Managing Director.  
**Date** 01/03/2007

<table>
<thead>
<tr>
<th>Financial</th>
<th>Customer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Increase sales to £2.5 million from £2.3 million now.</td>
<td>1. Increase average basket spend to £5.60 each from £4.99 now.</td>
</tr>
<tr>
<td>2. Raise profit by 2%</td>
<td>2. Reduce cash register queues to maximum of 3 deep.</td>
</tr>
<tr>
<td>3. Reduce shrinkage to 1.5%</td>
<td>3. Reduce wastage on fresh produce to 5% from 7%.</td>
</tr>
<tr>
<td>from 2.5% now.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Process</th>
<th>Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Introduce new fresh produce wastage policy to reduce and sell through quicker.</td>
<td>1. Train staff in new policies.</td>
</tr>
<tr>
<td>2. Introduce new security policies.</td>
<td>2. Add more cashiers at peak times.</td>
</tr>
</tbody>
</table>

These targets would then be given to the store management, supervisors and staff. Each level of staff would receive a different balanced score card that was applicable to their job role and it would clearly identify what their contribution and targets would be. This might look like this;
**Name.** Arthur Gantt. **Department.** Delicatessen. **Date.** 05/04/2007

<table>
<thead>
<tr>
<th><strong>Financial</strong></th>
<th><strong>Customer</strong></th>
</tr>
</thead>
</table>
| 1. Department sales to increase to £120,000 from £110,000.  
2. Profit to be £14,000 from targeted sales.  
3. Shrinkage to be £1,800 from sales target. | 1. Increase average deli basket spend to £2.30 from £1.99  
2. Complete cashier training to form multi-skilled queue busting team for peak times.  
3. Ensure reduced stock is prominent and appealing to customers. |

<table>
<thead>
<tr>
<th><strong>Process</strong></th>
<th><strong>Staff</strong></th>
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</thead>
</table>
| 1. New shrinkage process to be implemented once trained.  
2. New security process to be implemented at peak times. | 1. Assist in the training of new cashier staff.  
2. Develop sales skills.  
3. Operate tills at peak times. |

As you can see from the above example, it is a simple system but the balanced score card allows all members of a company, store and teams to know what the company wants in terms of its objectives and how they can contribute to these objectives.

The result of the review will be a Training Needs Analysis (TNA). This may be a formal document in some organisations or simply a list in others. Either way it records the training which has been identified for you.

In order to decide the best way to get the identified training, it would be helpful to recognise your preferred learning style. These are generally divided into four categories:

- **Activists.** They like new things and experiences. They will try anything once but prefer to see what happens rather than be told how to go about things. Given a new product they will try to find out everything about it by trial and error rather than reading the instruction manual.
v **Reflectors.** They like to consider new things and experiences. They will try something but then want to sit back and reflect on what they have learned before moving on. Given a new product they will try one feature and then think about the result before trying the next.

v **Theorists.** They want to know how things work and why. They will not try anything until they are sure they know what is going to happen. Given a new product they will read the instruction manual from cover to cover before unwrapping the product.

v **Pragmatists.** They want to practice new things before they do them for real. They are experimenters and want to be sure they know what they are doing before they start. Given a new product they will want to experiment with it before actually using it.

**Learning Styles**

Everybody has a mixture of all four learning styles. They will use different ones in different situations but we each have a preferred style. There are psychometric tests to establish your preferred style, but it is possible to determine for yourself.

Having established your training needs and your preferred learning style you will be able to produce a Personal Development Plan. This will list the training needed, how it is to be achieved, when and how you will measure the effectiveness of the training.

<table>
<thead>
<tr>
<th>Training need</th>
<th>Training method</th>
<th>Timescale</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Till training</td>
<td>Simulation followed by mentored live till use</td>
<td>Next week</td>
<td>Meets till-trained standards, to be multi-skilled</td>
</tr>
<tr>
<td>Stock counts</td>
<td>One day course</td>
<td>14.05.07</td>
<td>Accurate stock counts</td>
</tr>
<tr>
<td>Security awareness</td>
<td>Company videos and work book</td>
<td>During induction training, over the next three months</td>
<td>Shrinkage figures improved by 1.5%</td>
</tr>
</tbody>
</table>
If the training method identified is a training course, this may be available within the organisation or you may need to find a suitable external course that you can attend.

Any training you receive needs to be evaluated, it is no good attending a one day course on stock counts if the accuracy of your stock counts is not improved afterwards. For this reason the outcome must be measurable not a general statement such as ‘improved shrinkage figures’.

Keep a record of all training received, whether formal or informal, and the new skills you have attained. Add these to your CV as they will be invaluable if you apply for promotion.

**DID YOU KNOW?**
In the 1930s in order to help shoppers deal with the increased volume of goods they were purchasing, the shopping trolley was developed. In 1936 a storeowner named Sylvan Goldman invented what he called “basket carriers”. At first, customers were reluctant to use them, so Goldman employed six people to pretend to shop using his device. Sadly, there is no historical evidence to confirm that the shopper could push these contraptions in a straight line.

**ACTIVITY SIX**

Circle the words below which refer to learning styles.

- Activist
- Conformist
- Plagiarist
- Theorist
- Pragmatist
- Reactionary
- Reflector
- Stylist
UNIT E19: SIGN-OFF

Assessor’s Name: _________________________________
Assessor’s Signature:__________________ Date:___________
Learner’s Name: __________________________________
Learner’s Signature:__________________ Date:___________
Mentor’s Name: __________________________________
Mentor’s Signature:__________________  Date:___________
**ASSESSMENT ONE**

Create a job list showing all the regular tasks you have to complete; show how long each job should take to complete.

<table>
<thead>
<tr>
<th>Task</th>
<th>Time to complete</th>
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</thead>
<tbody>
<tr>
<td></td>
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</table>
ASSESSMENT TWO

Read the following scenarios

SCENARIO ONE  Tom is setting up a display of a new brand of MP3 player when a customer asks him to explain how it works and what its specification is. He has not had time to read the manual or receive any training on the MP3 player. His colleague, Louise, has received training from the supplier on the MP3 player but she is dealing with another customer.

What should he do?

If you have had a similar experience, what did you do?
SCENARIO TWO

Ashifa works in a luggage section in a busy department store. Her department is not taking part in a Red Cross Sale Day and as a result she has no customers, while nearby departments are extremely busy.

How should Juliette offer to help?

If you have had a similar experience, what did you do?
SCENARIO THREE  Graham is working in a hardware shop. He has a queue of seven customers waiting to pay for their goods at the only till. Bernadette, his manager, asks him to help her to move a delivery of apples that have just arrived at the back door.

What should Graham do?

If you have had a similar experience, what did you do?
ASSESSMENT THREE

How would you deal with a situation where a colleague is not delivering customer service, but prefers to hide and ignore customers for most of the day?

You arrive for work and say ‘Good morning’ as usual to your colleagues but one colleague ignores you. Another colleague tells you that she is upset because you made a joke about her being over-weight as you left the previous evening. You had not realised that this would upset her. What should you do about it?
You work as a sales person in a busy supermarket, you work on fresh produce. Every day when you take over from your colleague he has left it untidy with no carrier bags, many price labels missing, very little change in the till and rubbish all over the floor. You have raised this several times previously with your colleague. How would you deal with the situation and who would you ask for help and advice if you could not resolve it?

If you have experienced a situation similar to any of the above how did you deal with it?
## ASSESSMENT FOUR

Find out the law and what your company policy is on discrimination and write a brief description of it.

<table>
<thead>
<tr>
<th>Law</th>
<th>Company Policy</th>
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</table>

Find out the law and what your company policy is on harassment and write a brief description of it.

<table>
<thead>
<tr>
<th>Law</th>
<th>Company Policy</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>
Find out the law and what your company policy is on bullying and write a brief description of it.

<table>
<thead>
<tr>
<th>Law</th>
<th>Company Policy</th>
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</table>

If you have experienced any of the above, how was it dealt with?

<table>
<thead>
<tr>
<th>Law</th>
<th>Company Policy</th>
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</table>
**Why is it vital to follow instructions for safeguarding health and safety as you work?**

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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</table>
Why is it important for you to continually develop your skills and knowledge in your job?

Who would be responsible for setting your goals and helping you learn within your job role?

Why would you plan your learning and how would you need to meet deadlines for action points for learning?

<table>
<thead>
<tr>
<th>Plans</th>
<th>Deadlines and action points</th>
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Describe a company procedure for following training programmes

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</table>
Describe a way in which you could remember information, tasks and procedures

<table>
<thead>
<tr>
<th>Information</th>
<th>Tasks</th>
<th>Procedures</th>
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Describe the method you best remember and learn things

<table>
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<th>Strengths</th>
<th>Weaknesses</th>
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</table>
Compare the two and discuss the differences with your supervisor. Write your findings in the box below.

Look at the four different learning styles in the chapter. Which do you think best describes your learning style and why?

If you have completed a Training Needs Analysis, show it to your assessor. If you haven’t, complete one using the pro-forma below.

Training Needs Analysis
If you have completed a Personal Development Plan, show it to your assessor. If you haven’t, complete one using the pro-forma below.

<table>
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ASSESSMENT SIX

Why is it important to ask for feedback on your performance? How should you ask for it and how should you respond to it?

When is the most useful time to ask for feedback on your training progress? Why?

Explain how you would respond positively to feedback and use it to help you improve.
UNIT E19: ASSESSMENT SIGN-OFF

Assessor’s Name: ____________________________________________
Assessor’s Signature:____________________ Date:_______________
Learner’s Name: ____________________________________________
Learner’s Signature:____________________ Date:_______________
Mentor’s Name: ____________________________________________
Mentor’s Signature:____________________ Date:_______________