

# DETAILED SYLLABUS

## CSA 1 : Processing Credit Applications for Purchases

**Process Applications from Customers for Credit Facilities :** Identify the customer's needs for credit facilities; Clearly explain to the customer the features and conditions of credit facilities; Provide enough time and opportunities for the customer to ask for clarification or more information; Accurately fill in the documents needed to allow the customer to get credit; Successfully carry out the necessary credit checks and authorization procedures; Promptly refer difficulties in processing applications to the right person.

**Organizational Context and Technical Knowledge :** Knowledge of the features and conditions of the credit facilities offered by the company; Knowledge of legal and company requirements for giving information to customers when offering them credit facilities; Knowledge of legal and company procedures for carrying out credit checks and getting authorization for credit facilities; Knowledge of whom to approach for advice and help in sorting out difficulties in processing applications; Technical knowledge for determining the credit worthiness of an individual by using appropriate techniques and tools.

**Core / Generic Skills and Professional Skills :** Writing skills to complete documentation accurately and write simple reports when required; Reading skills to read information accurately and read and interpret data sheets; Oral communication to follow instructions accurately, use gestures or simple words to communicate where language barriers exist, use questioning to minimize misunderstandings; display courteous and helpful behavior at all times; Professional skills – decision making - to make appropriate decisions regarding the responsibilities of the job role, plan and organize – to plan and schedule routines, customer centricity – to build relationships with internal and external customers, problem solving – to identify and respond to breakdowns and malfunction of equipment, unsafe and hazardous working conditions and security breaches, analytical thinking – to identify and evaluate the supportings given for credit applications, critical thinking – to determine the impact of doing a thorough credit check for all applications received.

## CSA 2 : Keeping the Store secure

**Help Keep the Retail Environment Secure :** Take prompt and suitable action to reduce security risks as far as possible; Follow company policy and legal requirements when dealing with security risks; Recognize when security risks are beyond your authority and responsibility to sort out and report these risks promptly to the right person; Use approved procedures and techniques for protecting your personal safety when security risks arise; Follow company policies and procedures for maintaining security while you work; Follow company policies and procedures for making sure that security will be maintained when you go on your breaks and when you finish work.

**Organizational Context and Technical Knowledge :** Knowledge of the types of security risk that can arise in your workplace; Knowledge of how much authority and responsibility you have to deal with security risks, including your legal rights and duties; Knowledge of company policy and procedures for dealing with security risks in your workplace.

**Core / Generic Skills and Professional Skills :** Writing skills to complete documentation accurately and write simple reports when required; Reading skills to read information accurately and read and interpret data sheets; Oral communication to follow instructions accurately, use gestures or simple words to communicate where language barriers exist, use questioning to minimize misunderstandings; display courteous and helpful behavior at all times; Professional skills – decision making - to make appropriate decisions regarding the responsibilities of the job role, plan and organize – to plan and schedule routines, customer centricity – to build relationships with internal and external customers, problem solving – to identify and respond to breakdowns and malfunction of equipment, unsafe and hazardous working conditions and security breaches, analytical thinking – to respond to emergency situations as per the escalation matrix, critical thinking – to determine the impact of not securing the loss prevention and security equipment.

### **CSA 3 : Maintaining Health and Safety**

**Deal with Accidents and Emergencies :** Follow company procedures and legal requirements for dealing with accidents and emergencies; Speak and behave in a calm way while dealing with accidents and emergencies; Report accidents and emergencies promptly, accurately and to the right person; Recognize when evacuation procedures have been started and following company procedures for evacuation.

**Help to Reduce Risks to Health and Safety :** Follow the health and safety requirements laid down by your company and by law and encourage colleagues to do the same; Promptly take the approved action to deal with risks if you are authorized to do so; If you do not have authority to deal with risks, report them promptly to the right person; Use equipment and materials in line with the manufacturer's instructions.

**Organizational Context :** Knowledge of company procedures and legal requirements for dealing with and reporting accidents and emergencies; Reporting accidents and emergencies promote health and safety; Knowledge of company procedures for evacuation, including how the alarm is raised and where emergency exits and assembly points are; Knowledge of health and safety requirements laid down by the company and by law; Knowledge of authority and responsibility and approved procedures for dealing with health and safety risks; Knowledge of instructions for using equipment and materials.

**Technical Knowledge :** Technical knowledge of techniques for speaking and behaving in a calm way while dealing with accidents and emergencies; emergency response techniques; using machinery and escape methods to have minimal loss to material and life.

**Core / Generic Skills and Professional Skills :** Writing skills to complete documentation accurately and write simple reports when required; Reading skills to read information accurately and read and interpret data sheets; Oral communication to follow instructions accurately, use gestures or simple words to communicate where language barriers exist, use questioning to minimize misunderstandings; display courteous and helpful behavior at all times; Professional skills – decision making - to make appropriate decisions regarding the responsibilities of the job role, plan and organize – to plan and schedule routines, customer centricity – to build relationships with internal and external customers, problem solving – to identify and respond to breakdowns and malfunction of equipment, unsafe and hazardous working conditions and security breaches.

## **CSA 4 : Demonstrating Products to Customers, Helping Choose Right Products and Providing Specialist Support to Customers**

**Demonstrate Products to Customers :** Prepare the demonstration area and check that it can be used safely; Check you have the equipment and products required for demonstration; Explain and present the demonstration clearly and accurately and in a logical sequence and stages covering all the features and benefits needed to gain the customer's interest; Promptly clear away the equipment and products at the end of the demonstration.

**Help Customers Choose Products :** Find out which product features and benefits interest individual customers and focus on these when discussing products; Describe and explain clearly and accurately relevant product features and benefits to customers; Compare and contrast products in ways that help customers choose the product that best meets their needs and check customer's responses to your explanations; Encourage customers to ask questions and respond to their questions, comments and objections in ways that promote sales and goodwill; Identify suitable opportunities to tell the customer about associated or additional products in a way that promotes sales and goodwill; Constantly check the store for security, safety and potential sales while helping customers.

**Check the Customer's Preferences and Buying Decisions When Making Sales :** Give customers enough time to evaluate products and ask questions; Handle objections and questions in a way that promotes sales and keeps the customer's confidence; Identify the need for additional and associated products and take the opportunity to increase sales; Clearly acknowledge the customer's buying decisions, explain any customer rights that apply and explain to the customer where to pay for their purchases.

**Give Customers Information and Advice on Specialist Products :** Talk to customers politely and in ways that promote sales and goodwill; Use the information the customer gives you to find out what they are looking for and help the customer understand the features and benefits of the products; Explain clearly and accurately the features and benefits of the products, relating these to the customer's needs; Promote the products that give the best match between the customer's needs and the store's need; Spot and use suitable opportunities to promote other products where these will meet the customer's needs; Control the time you spend with the customer to match the value of the prospective purchase; Constantly check the store for safety, security and potential sales while helping individual customers.

**Demonstrate Specialist Products to Customers :** Ascertain customer's need for a demonstration, set up demonstration safely, ensure availability of everything needed for effective demonstration and give demonstration clearly showing the use and value of the products; Offer customers the opportunity to use the product themselves depending upon the need and give customer enough chance to ask questions about the products or services; Check the store for security, safety and potential sales during the demonstration.

**Organizational Context and Technical Knowledge:** Knowledge of promoting sales and goodwill, helping customers to choose products, explaining product features and benefits to customers and checking and interpreting customer responses; Adapting explanations and responding to questions and comments in ways that promotes sales and goodwill; Encouraging customers to ask you for clarification and more information; The risks of not paying attention to the store, in terms of security, safety and lost sales; Recognizing buying signals from customers and handling objections and questions confidently and effectively; Legal rights and responsibilities of retailers and customers to do with returning of unsatisfactory goods; Knowledge of adapting your speech, body language and sales style to appeal to different kinds of customer; Company policy on customer service as applicable to giving specialist information and advice to customers; **Technical knowledge** of features and benefits of the products to be demonstrated; applicable warranty, replacement/repair and

annual maintenance costs; Techniques for closing the sale; Product features and benefits; Features and benefits of the specialist products and advantages compared with similar products offered by competitors.

**Core / Generic Skills and Professional Skills :** Writing skills to complete receiving and storage documentation accurately and write simple reports when required; Reading skills to read delivery information in order to set up the correct receiving structures and storage requirements and read and interpret data safety sheets for perishable products; Oral communication to follow instructions accurately, use gestures or simple words to communicate where language barriers exist, use questioning to minimize misunderstandings; display courteous and helpful behavior at all times; Professional skills – decision making - to make appropriate decisions regarding the responsibilities of the job role, plan and organize – to plan and schedule receipt and movement of goods, customer centricity – to build relationships with internal and external customers, problem solving – to identify and respond to over or under supply of goods, multiple deliveries at the same time, breakdowns and malfunction of equipment, unsafe and hazardous working conditions and security breaches; analytical ability – to calculate totals of goods accurately to determine over or under goods, critical thinking – to determine the impact of any discrepancy and action as appropriate.

## **CSA 5 : Maximizing Sales of Goods and Services and Providing Personalized Sales and Post Sales Service Support**

**Identify Opportunities to Increase Sales of Particular Products :** Identify promotional opportunities and estimate their potential to increase sales and identify those offering the greatest potential to increase sales; Report promotional opportunities to the right person and fill in the relevant records fully and accurately.

**Promote Particular Products :** Tell customers about promotions clearly and in a persuasive way; Identify and take the most effective actions for converting promotional sales into regular future sales; Gather relevant and accurate information about the effectiveness of promotions and communicate this information clearly to the right person; Record clearly and accurately the results of promotions.

**Provide a Personalized Service :** Use available information in the client records to help you prepare for consultations and check that work area is clean and tidy and all the equipment are in hand before starting a consultation; Talk and behave towards the client in ways that project the company image effectively; Ask questions that encourage the client to tell you about their buying needs, preferences and priorities, Where appropriate, tactfully check how much, the client wants to spend; Explain clearly to the client the features and benefits of the products or services you are recommending and relate these to the client's individual needs; Identify suitable opportunities to sell additional or related products or services that are suited to the client's needs; Make recommendations to the client in a confident and polite way and without pressurizing them; Pace client consultations so you make good use of your selling time while maintaining good relations with the client; Meet your company's customer service standards in your dealings with the client.

**Provide an After Sales Service :** Follow the company procedures for keeping client records up-to-date; Record client information accurately and store it in the right places in your company's system and keep it confidential and share it only with people who have right to it; Keep to client's wishes as to how and when you may contact them and follow company's policy and procedures for contacting clients; Where you cannot keep promises to clients, tell them promptly and offer any other suitable products or services.

**Organizational Context and Technical Knowledge:** Knowledge of seasonal trends and how they affect opportunities for sales; Knowledge of estimating and comparing the potential of promotional opportunities to increase sales; Knowledge of techniques for building customer's interest in regularly buying in future the product being promoted; Knowledge of evaluating and recording the results of promotions; Knowledge of company's desired image and how to project this to clients and creating and creating and maintaining a rapport with clients, both new and existing; Technical knowledge of brands and services, including seasonal trends, new brands or services, promotions, stock levels, competitor comparisons, additional services such as store cards, gift wrapping or delivery.

**Core / Generic Skills and Professional Skills :** Writing skills to complete receiving and storage documentation accurately and write simple reports when required; Reading skills to read delivery information in order to set up the correct receiving structures and storage requirements and read and interpret data safety sheets for perishable products; Oral communication to follow instructions accurately, use gestures or simple words to communicate where language barriers exist, use questioning to minimize misunderstandings; display courteous and helpful behavior at all times; Professional skills – decision making - to make appropriate decisions regarding the responsibilities of the job role, plan and organize – to plan and schedule receipt and movement of goods, customer centricity – to build relationships with internal and external customers, problem solving – to identify and respond to over or under supply of goods, multiple deliveries at the same time, breakdowns and malfunction of equipment, unsafe and hazardous working conditions and security breaches; analytical ability – to calculate totals of goods accurately to determine over or under goods, critical thinking – to determine the impact of any discrepancy and action as appropriate.

## **CSA 6 : Creating Positive Image of Self and Organization**

**Establish Effective Rapport with Customers :** Meet your organization's standards of appearance and behaviour; Greet your customer respectfully and in a friendly manner; Communicate with your customer in a way that makes them feel valued and respected; Identify and confirm your customer's expectations; Treat your customer courteously and helpfully at all times; Keep your customer informed and reassured; Adapt your behavior to respond effectively to different customer behavior.

**Respond Appropriately to Customers :** Respond promptly to a customer seeking assistance; Select the most appropriate way of communicating with your customer; Check with your customer that you have fully understood their expectations; Respond promptly and positively to your customer's questions and comments; Allow your customer time to consider your response and give further explanation when appropriate,

**Communicate Information to Customers :** Quickly locate information that will help your customer; Give your customer the information they need about the services or products offered by your organization; Recognize information that customer might find complicated and check whether they fully understand; Explain clearly to your customers any reasons why their needs or expectations cannot be met.

**Organizational Context :** Organization's standards for appearance and behavior; Organization's guidelines for how to recognize what your customer wants and respond appropriately; Organization's rules and procedures regarding the methods of communication you use; Recognizing when a customer is angry or confused; Organization's standards for timeliness in responding to customer questions and requests for information.

**Core / Generic Skills and Professional Skills :** Writing skills to complete documentation accurately and write simple reports when required; Reading skills to read information accurately and read and interpret data sheets; Oral communication to follow instructions accurately, use gestures or simple words to communicate where language barriers exist, use questioning to minimize misunderstandings; display courteous and helpful behavior at all times; Professional skills – decision making - to make appropriate decisions regarding the responsibilities of the job role, plan and organize – to plan and schedule routines, customer centricity – to build relationships with internal and external customers, problem solving – to identify and respond to breakdowns and malfunction of equipment, unsafe and hazardous working conditions and security breaches.

## **CSA 7 : Resolving Customer Concerns, Organizing the Delivery of Reliable Service and Improving Customer Relationship**

### **Spot Customer Service Problems and Pick the Best Solution to Resolve Customer Service Problems:**

Identify the options for resolving a customer service problem and work with others to identify and confirm the options; Work out the advantages and disadvantages of each option and pick out the best option for your customer and your organization; Identify for your customer other ways that problems may be resolved if you are unable to help.

**Take Action to Resolve Customer Service Problems :** Discuss and agree the options for solving the problems with your customer; Take action to implement the option agreed with the customer; Work with others and your customer to make sure that any promises related to solving the problem are kept; Keep your customer fully informed about what is happening to resolve problems and check with your customer to make sure the problem has been resolved to their satisfaction; Give clear reasons to your customer when the problem has not been resolved to their satisfaction.

**Plan and Organize the Delivery of Reliable Customer Service :** Plan, prepare and organize everything you need to deliver a variety of services or products to different types of customers; Organize what you do to ensure that you are consistently able to give prompt attention to your customers; Reorganize your work to respond to unexpected additional workloads.

**Review and Maintain Customer Service Delivery :** Maintain service delivery during very busy periods and unusually quiet periods and when systems, people or resources have let you down; Consistently meet your customer's expectations and balance the time you take with your customers with the demands of other customers seeking your attention; Respond appropriately to your customers when they make comments about the products or services being offered; Alert others to repeated comments made by your customers; Take action to improve the reliability of your service based on customer comments; Monitor whether the action you have taken has improved the service you give to your customers.

**Use Recording Systems to Maintain Reliable Customer Service :** Record and store customer service information accurately following organizational guidelines; Select and retrieve customer service information that is relevant, sufficient and in an appropriate format; Quickly locate information that will help solve a customer's query; Supply accurate customer service information to others using the most appropriate method of communication.

**Improve Communication with Your Customers :** Select and use the best method of communication to meet your customer's expectations; Take the initiative to contact your customers to update them when things are not going to plan or when you require further information; Adapt your communication to respond to individual customer's feelings.

**Balance the Needs of Your Customer and Your Organization :** Meet your customer's expectations within your organization's service offer; Explain the reasons to your customers sensitively and positively when their expectations cannot be met; Identify alternative solutions for your customers either within or outside the organization; Identify the costs and benefits of these solutions to your organization and to your customers; Negotiate and agree solutions with your customers which satisfy them and are acceptable to your organization and take action to satisfy your customers with the agreed solution.

**Exceed Customer Expectations to Develop the Relationship :** Make extra efforts to improve your relationship with your customers; Recognize opportunities to exceed your customer's expectations and take action to exceed your customer's expectations within the limits of your own authority; Gain the help and support of others to exceed your customer's expectations.

**Organizational Context : Knowledge of** Listening carefully to customers about problems they have raised and asking customers about the problem to check your understanding; Recognizing repeated problems and alerting appropriate authority; Sharing customer feedback with others to identify potential problems before they happen; Organizational procedures and systems for delivering customer service and for recording, storing, retrieving and supplying customer service information; Identifying useful customer feedback and communicating feedback from customers to others; Legal and regulatory requirements regarding the storage of data; Making best use of the method of communication chosen for dealing with customers and negotiating effectively with customers; Assessing the costs and benefits to your customer and your organization of any unusual agreement you make; Customer loyalty and/or improved internal customer relationships to your organization.

**Technical Knowledge : Technical knowledge of** identifying problems with systems and procedures before they begin to affect your customers; CRM software to capture customer feedback and draw analysis.

**Core / Generic Skills and Professional Skills :** Writing skills to complete documentation accurately and write simple reports when required; Reading skills to read information accurately and read and interpret data sheets; Oral communication to follow instructions accurately, use gestures or simple words to communicate where language barriers exist, use questioning to minimize misunderstandings; display courteous and helpful behavior at all times; Professional skills – decision making - to make appropriate decisions regarding the responsibilities of the job role, plan and organize – to plan and schedule routines, customer centricity – to build relationships with internal and external customers, problem solving – to identify and respond to breakdowns and malfunction of equipment, unsafe and hazardous working conditions and security breaches.

## **CSA 8 : Monitoring and Solving Service Concerns and Promoting Continuous Improvement in Service**

**Solve Immediate Customer Service Problems :** Respond positively to customer service problems following organizational guidelines; Solve customer service problems when you have sufficient authority and work with others to solve customer service problems; Keep customers informed of the actions being taken and check with customers that they are comfortable with the actions being taken; Solve problems with service systems and procedures that might affect customers before they become aware of them; Inform managers and colleagues of the steps taken to solve specific problems.

**Identify Repeated Customer Service Problems and Options for Solving Them :** Identify repeated customer service problems; Identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option; Work with others to select best options for solving repeated customer service problems, balancing customer expectations with needs of your organization.

**Take Action to Avoid the Repetition of Customer Service Problems :** Obtain the approval of somebody with sufficient authority to change organizational guidelines in order to reduce the chance of a problem being repeated; Action your agreed solution; Keep your customers informed in a positive and clear manner of steps being taken to solve any service problems; Monitor the changes you have made and adjust them if appropriate.

**Plan Improvements in Customer Service based on Customer Feedback :** Gather feedback from customers that will help to identify opportunities for customer service improvement; Analyze and interpret feedback to identify opportunities for customer service improvements and proposed changes; Discuss with others the potential effects of any proposed changes for your customers and your organization; Negotiate changes in customer service systems and improvements with somebody of sufficient authority to approve trial/full implementation of the change.

**Implement Changes in Customer Service :** Organize the implementation of authorized changes and implement the changes following organizational guidelines; Inform people inside and outside your organization who need to know of the changes being made and the reasons for them; Monitor early reactions to changes and make appropriate fine-tuning.

**Review Changes that Promote Continuous Improvement in Customer Service :** Collect and record feedback on the effects of changes and analyze and interpret feedback and share your findings on the effects of changes with others; Summarize the advantages and disadvantages of the changes; Use your analysis and interpretation of changes to identify opportunities for further improvement and present these opportunities to somebody with sufficient authority to make them happen.

**Organizational Context : Knowledge of** organizational procedures and systems for dealing with customer service problems and identifying repeated customer service problems; How successful resolution of customer service problems contributes to customer loyalty with external customer and improved working relationships with service partners or internal customers; How to negotiate with and reassure customers while their problems are being solved; Service improvements affecting the balance between overall customer satisfaction, costs of providing service and regulatory needs; How customer experience is influenced by the way service is delivered; Collecting, analyzing and presenting customer feedback; Making a business case to others to bring about change in the products or services you offer.

**Core / Generic Skills and Professional Skills :** Writing skills to complete documentation accurately and write simple reports when required; Reading skills to read information accurately and read and interpret data sheets; Oral communication to follow instructions accurately, use gestures or simple words to communicate where language barriers exist, use questioning to minimize misunderstandings; display courteous and helpful behavior at all times; Professional skills – decision making - to make appropriate decisions regarding the responsibilities of the job role, plan and organize – to plan and schedule routines, customer centricity – to build relationships with internal and external customers, problem solving – to identify and respond to breakdowns and malfunction of equipment, unsafe and hazardous working conditions and security breaches.



## CSA 9 : Work Efficiently in Team and Organization

**Support the Work Team :** Display courteous and helpful behavior at all times; Take opportunities to enhance the level of assistance offered to colleagues; Meet all reasonable requests for assistance within acceptable workplace timeframes; Complete allocated tasks as required; Seek assistance when difficulties arise; Use questioning techniques to clarify instructions or responsibilities; Identify and display a non-discriminatory attitude in all contacts with customers and other staff members.

**Maintain Personal Presentation :** Observe appropriate dress code and presentation as required by the workplace, job role and level of customer contact; Follow personal hygiene procedures according to organizational policy and relevant legislation.

**Develop Effective Work Habits :** Interpret, confirm and act on workplace information, instructions and procedures relevant to the particular task; Interpret, confirm and act on legal requirements in regard to anti-discrimination, sexual harassment and bullying; Ask questions to seek and clarify workplace information; Plan and organize daily work routine within the scope of the job role; Prioritise and complete tasks according to required timeframes; Identify work and personal priorities and achieve a balance between competing priorities.

**Support Effective Team Working :** Share work fairly with colleagues, taking account of your own and other's preferences, skills and time available; Make realistic commitments to colleagues and do what you have promised to do; Let colleagues know promptly if you will not be able to do what has been promised and suggest suitable alternatives; Encourage and support colleagues when working conditions are difficult and who are finding it difficult to work together; Follow the company's health and safety procedures.

**Help Plan and Organise Own Learning :** Discuss and agree with the right people goals that are relevant, realistic and clear; Identify the knowledge and skills to achieve desired goals; Action points and deadlines that are realistic, taking account of your past learning experiences and the time and resources available for learning; Regularly check your progress, when necessary, and ask for feedback on your progress and use the feedback to improve your performance.

**Help Others Learn :** Encourage colleagues to ask you for work related information or advice and notice when colleagues are having difficulty performing tasks; Give clear, accurate and relevant information and advice relating to tasks and procedures and explain and demonstrate procedures clearly, accurately and in a logical sequence; Encourage colleagues to ask questions and give them opportunities to practice new skills and give constructive feedback; Check that health, safety and security are not compromised when you are helping others to learn.

**Organizational Context:** Knowledge of the policies and procedures relating to the job role; The value system of the organization; Employee rights and obligations; The reporting hierarchy and escalation matrix; Team's purpose, aim, targets and responsibility; Colleagues roles and main responsibilities and importance of sharing work fairly with colleagues; Factors affecting your own and colleague's willingness to carry out work and commitments, including your existing workload and degree; The importance of maintaining team morale and good working relations and techniques for removing tension between colleagues; The importance of following company policies and procedures for health and safety; Identifying the knowledge and skills to achieve the goals; Checking progress, adjusting plans as needed and feedback on progress.

**Technical Knowledge :** Knowledge to ask questions to identify and confirm requirements; Follow routine instructions through clear and direct communication; Use language and concepts appropriate to cultural differences; Use and interpret non-verbal communication; The scope of

information or materials required within the parameters of the job role; Consequences of poor team participation on job outcomes; Work health and safety requirements.

**Core / Generic Skills and Professional Skills :** Writing skills to complete workplace documentation accurately, write simple reports when required; Reading skills to read and interpret workplace documentation and read and interpret organizational policies and procedures and data sheets; Oral communication to follow instructions accurately, use gestures or simple words to communicate where language barriers exist, use questioning to minimize misunderstandings; display courteous and helpful behavior at all times; Professional skills – decision making – to make appropriate decisions regarding the responsibilities of the job role, plan and organize – to plan and schedule time personal management, plan and schedule routines, customer centricity – to build relationships with internal and external customers, problem solving – to identify and respond to ambiguity in directions and instructions, breakdown in relationships within the team and breakdowns in communications with other teams, breakdowns and malfunction of equipment, unsafe and hazardous working conditions and security breaches.