







# **Facilitator Guide**







Sector

Retail

Sub-Sector

**Retail Operations** 

Occupation

**Store Operations** 

Retail
Trainee Associate

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NSQF: Level 3

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Skilling is building a better India.

If we have to move India towards development then Skill Development should be our mission.

**Shri Narendra Modi** Prime Minister of India



### **Acknowledgements** -

We thank the following organisations for endorsing the contents of this Facilitator Guide, thus contributing towards skilling based on the Qualification Pack (QP) and National Occupational Standards (NOSs).















#### - About this Guide ——

This Facilitator Guide is designed to enable training for the Retail Trainee Associate Qualification Pack (QP). Each National Occupational Standard (NOS) is covered across Unit/s.

Key Learning Objectives for the specific NOS mark the beginning of the Unit/s for that NOS.

The guide aims to build trainer capability to deliver training programs by:

- Enabling a trainer to create conducive climate for learning
- Creating standardization and uniformity in training content and delivery
- Providing necessary knowledge and information on the Qualification Pack-National Occupational Standards for Trainee Associate
- Providing learning/reference material comprising Facilitation Notes, Tips, What to Say, What to Do, What to Ask etc. thereby enhancing quality of training delivery

The symbols used in this book are described below

#### **Symbols Used**



Steps



Tips



Notes



Objectives



Do



Say



**Ask** 



**Explain** 



Elaborate



Field Visi



Practica



Example



**Summary** 



Exercise



**Team Activity** 



Facilitation Notes



Learning Outcomes



**Role Play** 



Resources



Activity

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# 1. Introduction

Unit 1.1 - Icebreaker

Unit 1.2 - Objectives of the Program

Unit 1.3 - Retail Sector in India

Unit 1.4 - Job Role of a Retail Trainee Associate



# 

#### At the end of this module, students will be able to:

- 1. Build rapport with fellow students of the program
- 2. List the objectives of this program
- 3. Understand the retail sector in India
- 4. Describe who is a Retail Trainee Associate
- 5. Explain the roles and responsibilities of a Retail Trainee Associate
- 6. Identify the skills and personal attributes required for performing the job role of a Retail Trainee Associate

#### **UNIT 1.1: Icebreaker**

### **Unit Objectives**

#### At the end of this unit, students will be able to:

- Introduce each other 1.
- 2. Build a rapport with the fellow students and trainer
- Know the name and additional information about the fellow students

### Sav



- My name is and I will be your trainer for this session.
- Thank you all for your participation.
- Please take your respective seats.

#### **Notes for Facilitation**



Add more details when introducing yourself, such as your experience, your native place, your education, your hobbies etc.

# Resources to be Used



- Paper slips
- An empty box

#### **Activity**



- Before the class could assemble, write sentence starters on paper slips. Use the following sentences and create your own, as required:
  - Although most people don't find...
  - I am...
  - I have never...
  - I love it when...
  - I love to...
  - I think I have the best...
  - I would never...
  - My idea of beauty is...
  - The best thing I ever did as a child is...
  - The best way for me to relax is...
  - The best way to save...
  - The biggest and best...
  - The funniest thing that ever happened to me was...

- The lowest...
- The most important decision I ever made in my life was...
- The most unbelievable thing...
- The thing that makes me laugh is...
- There is nothing I enjoy more than...
- I find it funny when...
- My biggest achievement in life is...
- 2. Make sure that there is at least one slip for each student. You can repeat the starter statements if required.
- 3. Fold all slips and put them in an empty box.
- 4. Have each student pull a slip from the box.
- 5. Ask each student to start their introduction with the starter statement they have received.
- 6. Give an example if required.
- 7. Ask them to provide several additional sentences of information that coincides with their sentence starter.
- 8. Following the sentence starter, ask them to introduce themselves, including their name, experience and origin.

#### **Notes for Facilitation**



- Optionally, ask the students to sit in a circle and pull slips.
- Encourage shy students to provide information about themselves by prompting them with questions related to the starter statement.

#### Say



- Thank you for your participation and I appreciate your efforts.
- Now that we all know each other, let's move on to knowing the objective of this module.
- I would request you all to participate and ask questions whenever you are in doubt.
- Let's make this session as interactive as we can.
- I encourage you to gain maximum from this program.

#### **Notes for Facilitation**



Start the session only when the entire class is settled down.

Notes 🗐		

#### **UNIT 1.2: Objectives of the Program**

# **Program Objectives**



#### At the end of this unit, students will be able to:

- Understand the role of a Trainee Associate in the retail sector. 1.
- 2. Explain how to display materials in retail stores
- 3. Describe how to plan and prepare visual merchandising displays
- 4. Elaborate on how to dress visual merchandising displays
- 5. Explain the procedures to dismantle retail displays
- 6. Describe products for sale
- 7. Interpret loyalty scheme promotions
- Comprehend the concepts of store security 8.
- 9. Discuss the concepts of health and safety at workplace
- 10. Interpret how to maintain store cleanliness and hygiene
- 11. Discuss the concepts of effective customer service
- 12. Describe how to present yourself positively
- 13. Comprehend how to work effectively in a retail team

#### **Notes for Facilitation**



- Ask the students about the expectations from the course.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the program.
- Start with a positive and happy note.

Notes ————————————————————————————————————	

### **UNIT 1.3: Retail Sector in India**

#### - Unit Objectives

#### At the end of this unit, students will be able to:

- 1. Understand the meaning of Retail
- 2. Understand the essence of Retailing

#### 1.3.1. What is Retail?

#### **Ask**



- Ask the students what they know about the term 'Retail'.
- Ask the students what they know about the retail sector in India.

#### **Notes for Facilitation**



- Ask the aforementioned questions randomly to 3-4 students in the class.
- Once the students are finished talking about their pre-knowledge, reiterate the points.
- Explain the term 'Retail'.
- Provide an example of a mobile store explaining the concept.

#### Say



- The word 'Retail' refers to the process of selling goods or services directly to customers.
- Products can be sold through multiple channels, like malls, departmental stores and e-commerce sites.
- For example, a mobile store selling the handset is the retailer and the commodity being sold is the product.
- Retailers purchase goods in bulk quantities (large numbers) and sell to end-users, who are the customers.



Fig. 1.1 Retail Outlet

#### 1.3.2. What do the Retailers do?

#### Ask



• Ask the students if they know what retailers do.

#### **Notes for Facilitation**



- List the responses from students on the whiteboard.
- Try to categorise the valid responses into categories.
- Explain the various activities performed by retailers.

#### Say



#### Activities performed by retailers are:

- Buying
- Breaking down bulk stock
- Maintaining stock
- Promoting products
- Transporting and advertising



Fig. 1.2 Stock of Goods Under One Roof

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

#### **Summarise**



- Summarise the meaning of Retail.
- Summarise the essence of Retailing.

#### **UNIT 1.4: Job Role of a Retail Trainee Associate**

### - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Understand who is a Trainee Associate
- 2. Understand the job role of a Trainee Associate
- 3. Explain the skills and physical attributes of a Trainee Associate

#### Do



- On the basis of experience, ask 1-2 students to explain the job role of a Trainee Associate in a retail store.
- If someone is experienced in the field, ask him/her to explain what has been their role so far.

#### 1.4.1. Who is a Retail Trainee Associate?

### Do



• Elaborate on students' responses to explain who is a Trainee Associate.

#### Say



- A Trainee Associate is an individual who interacts with customers at the store to understand their needs and to provide them with relevant service and information.
- Trainee Associates are responsible for product display, store maintenance and store sales.



Fig. 1.3 Trainee Associate

#### 1.4.2. What is the Job Role of a Retail Trainee Associate?

#### Do

Elaborate on students' responses to explain the job role of a Trainee Associate.



- Trainee Associates interact with customers to understand their needs and service them by effecting sales of relevant products.
- These individuals need to be physically fit and energetic to be able to work for long hours while ensuring great customer service.
- They would also need good interpersonal and listening skills.

#### 1.4.3. Skills and Physical Attributes of a Retail Trainee **Associate**



Ask the students to recall the characteristics of an associate when they walk in a store.

#### **Notes for Facilitation**



- List the responses on the whiteboard.
- On the basis of response, explain the physical characteristics of a Trainee Associate.



- As a Trainee Associate, you would be required to walk around the store to display products, move around merchandise and interact with potential customers.
- You should be able to handle and reach out for products that customers wish to see or buy.
- A good Trainee Associate should have appropriate listening and communication skills to be able to handle customer queries confidently to solve them efficiently.



Fig. 1.4 Trainee Associate Walking Around the Store

# Tips 🗓

#### Provide the following tips describing the key job roles of a Trainee Associate:

- To keep the store secure.
- To maintain health and safety.
- To keep the store clean and hygienic.
- To display stock to promote sales.
- To prepare products for sale.
- To plan and prepare visual merchandising displays.
- To dress up visual merchandising displays.
- To dismantle and store visual merchandising displays.
- To provide information and advice to customers.
- To promote loyalty schemes to customers.
- To create a positive image of self as well as the organisation in the customer's mind.
- To work effectively with the team.

#### **Notes for Facilitation**



- Ask the students to refer to their participant guides for Unit 1 exercise and ask them to complete
  it.
- Assist students in completing their exercise questions, as required.
- Ask them if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.

#### Summarise



- Summarise who is a Trainee Associate.
- Summarise the job role of a Trainee Associate.
- Summarise the skills and physical attributes of a Trainee Associate

#### Notes



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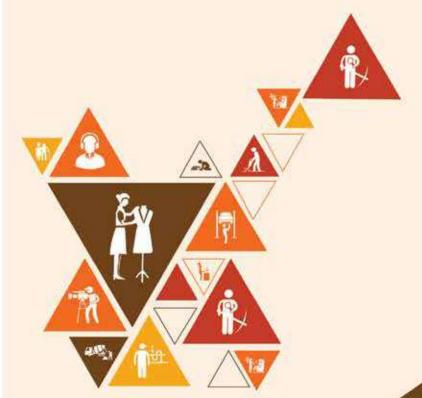






# 2. Display of Stocks in Retail Stores

- Unit 2.1 Stock Display
- Unit 2.2 Proper Set Up for Retail Displays
- Unit 2.3 Determining Display Requirements Using Store Procedures
- Unit 2.4 Legal and Statutory Requirements for Stock Display
- Unit 2.5 Importance of Labelling Materials and Equipment
- Unit 2.6 Excess Material and Equipment



#### Key Learning Outcomes 💆

#### At the end of this module, students will be able to:

- 1. Understand proper set up for stock for display
- 2. Understand requirements for stock display in alignment with the store procedures
- 3. Identify the legal and statutory requirements for stock display.
- 4. Understand the importance of labelling materials and equipment.
- 5. List the requirements for labelling stock.
- 6. Recognise and check if information on the label is clear, accurate and legal before starting to label stock.
- 7. Promptly report about a label information that may need a change.
- 8. Illustrate and attach the right labels to the right products.
- 9. Examine the positioned labels so that they are securely fastened and clearly visible to customers.
- 10. Demonstrate complete labelling within the time allotted.

#### **Notes for Facilitation**



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

### **UNIT 2.1: Stock Display**

#### **Unit Objectives**



#### At the end of this unit, students will be able to:

- 1. Define stock display
- 2. Understand importance of good stock display in retail stores
- 3. Identify various effective display techniques for retail stores
- 4. Understand the factors that determine display requirements

#### 2.1.1. Introduction to Stock Display





Ask the students to recall the features of a stock display in a retail store they have visited.

#### Do



Randomly ask 2-3 students to share their experiences of how those stock displays attracted them into the stores.

#### Ask



Ask the students if they can think from a retailer's perspective on how stock displays are important to them.

### **Notes for Facilitation**



- Pick the keywords from students' responses and write them on a flip chart.
- Mention the importance of stock displays for retailers.
- Provide examples of stock displays of McDonald's and Subway.
- Explain how stock display can vary from one retail store to another.

#### Say



- Stock display is important for retailers as it helps them to:
  - o Attract customer attention
  - o Create customer interest
  - o Generate curiosity among potential buyers
  - o Exhibit key product features
  - o Provide product-related information

For example, you can easily recognise any McDonald's or Subway outlet in any area of a town or city all over the world. This is because the store design and display of stock remains similar in all outlets everywhere.



Fig. 2.1 A McDonald's Outlet

A large superstore chain usually has a well-defined process and pattern of displaying stock, while there is no such strategy followed in a small kirana store.

#### Team Activity



- Conduct a skill practice team activity.
- Divide the students in teams of 3-4 students.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Ask them to visit a retail store of their choice in their area and examine the way stocks have been displayed.
- Ask the students to discuss in their teams and decide how those stock displays are effective in helping them to attract customers.
- Ask the students to prepare a report based on their observations.
- Tell them to choose a representative from their team and share their reports.
- Initiate a discussion, as required.

Skill Practice	Time	Resources
Analysing Stock Displays	1 hour	Pencil and paper

#### **Notes for Facilitation**



Ask students to refer to their Participant Handbook for images showing the techniques of effective displaying.

#### Provide tips on giving people to come to the store:

- Use unique and attractive display.
- Give online coupons for in-store.

#### **Notes for Facilitation**



- Ask them if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

#### Summarise



- Summarise the meaning of stock display.
- Summarise the importance of good stock display in retail stores.
- Summarise various effective display techniques for retail stores.
- Summarise the factors that determine display requirements.

- Notes				
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#### **UNIT 2.2: Proper Setup for Retail Displays**

### -Unit Objectives 🏻



#### At the end of this unit, students will be able to:

- Distinguish how organised displays are better than unorganised displays
- 2. Analyse the theme or look of a retail store
- 3. Distinguish between permanent and movable displays
- 4. Recognise importance of keeping displays fresh
- 5. Identify store layout strategies

#### 2.2.1. Different Retail Display Setups





Explain the importance of retail display setups.



#### It is important that:

- All stocks must be presented in a pleasant and orderly manner.
- Products must be easily accessible to customers.
- All product features should be clearly visible.

#### 2.2.2. The Theme or "Look"

#### Field Visit



- Conduct a field visit to a nearby shopping mall.
- Divide students into teams of 3-4 team each and assign each team a store to study.
- Ask students to examine the display theme of the assigned store.
- Ask them to note their observations as a team and prepare a report.
- Assist them, whenever required, and resolve their queries.



- You can see themes in various styles, that is, from fanciful to formal, with anything in between. It is mainly determined by the customers whom you are trying to persuade and the goods which are being sold.
- Lighting is one of the major ingredients of any outlet's ambience.

#### 2.2.3. Permanent vs. Movable Displays



Elaborate on students' findings from the last field visit and explain permanent and movable displays by giving examples.



- Keeping movable fixtures at a store helps in removing the boredom and thus, maintains flexibility.
- The outlets selling gifts, decorative items, furniture, etc., attract customers by their ambience. If you are selling garden tools, paint or hardware, permanent display racks work just fine.
- For example, if products are sold for indoor use then furniture can be used for a good portion of the displays.

#### 2.2.4. Keeping Displays Fresh



Ask students if they buy from a store if the products look stale and boring.

#### Notes for Facilitation



Since most of the responses would be 'no', explain the importance of keeping displays fresh.



- To attract your customers, you have to implement new ideas as per the needs.
- Old products may be moved to a new spot, which will, at times, make the customers think that it is a new arrival and thus, pay more attention to it.
- Most of the customers may come and ask, "What new items have arrived since my last visit?"

#### 2.2.5. Store Layout Strategies





Explain the importance of store layout strategies by giving examples.



- It is quite boring to go to an outlet where all products are displayed against the outer walls.
- Display strategies try to make sure that those items which are breakable are not placed on a surface which is unsteady, where the customers can bump into them.

# Example 🔽

- In case of a kitchen theme, the outlet must be decorated and displayed with the items, such as edible things, cookbooks, spice trivets and magnets.
- In case of jewellery, adult clothing and children's toys and clothes, the outlet must be decorated and displayed with a compatible theme.

# Team Activity

- Conduct a skill practice team activity.
- Divide the students in teams of 3-4 students.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Ask them to visit a retail store of their choice and examine how important proper displays are for the sales to increase.
- Ask the students to discuss in their teams and come up with at least 5 pointers explaining the importance of displays.
- Tell them that the team that will answer all the tasks correctly will be the winner.
- Tell them to choose a representative from their team and say their answers out loud in the class one at a time.
- Make the class applaud the winning team with a clap.

Skill Practice	Time	Resources
Importance of Displays	1 Hour	Pencil and paper

#### 2.2.6. Window Displays



Elaborate on students' findings if any team has mentioned window displays in the last activity.

### Sav

- Make your window displays more interesting in order to encourage your customers to come to the outlets and see what new you have for them.
- Attractive and eye-catching window displays can boost up the store traffic.
- Store size plays a major role while setting up retail display.
- As a trainee associate in a retail store, one of your responsibilities would be to identify short comings in product displays and report them to the concerned authority.



Fig. 2.2 Limited Display Area

#### Resources to be Used



Computers and Internet.

#### **Activity**



- Ask the students to think and list things they would consider when setting up and dismantling displays in a retail.
- Ask them to do an online search if required.
- After 10 minutes, ask 2-3 students randomly to share their lists.
- Assist and correct them, as required.
- Ask the rest of the class if they have any different items in the list.

# Tips 🚇



#### Provide the following tips:

- If you are rolling out a range of display items across a chain of retail stores, discuss the best ways to keep, distribute and install them.
- Properly organised and segregated displays make it easier for customers to view and pick up products.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

#### **Summarise**



- Summarise how organised displays are better than unorganised displays.
- Summarise the theme or look of a retail store.

- Summarise the difference between permanent and movable displays.
- Summarise the importance of keeping displays fresh.
- Summarise store layout strategies.

– Notes 🗐 –
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# UNIT 2.3: Determining Display Requirements Using Store Procedures

### - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Recognise store procedures that can allow retailers to determine their display requirements
- 2. Explain the steps to prepare stock displays
- 3. List elements of effective visual merchandising

#### 2.3.1. What are the Store Procedures for Display?





Explain store procedures that can allow retailers to determine their display requirements:

Locate appropriate display area in the store and modify it as per the stock that needs to be displayed.

Gather materials and equipment to be displayed.

Strictly follow measures like safety and cleanliness.

Ascertain all statutory and legal requirements for displaying stock.

Determine stock quantity that can be displayed easily without creating a messed up look.

Evaluate the area needed for displaying.

# **Example**

Kumar works as a Trainee Associate at a retail store. His store manager instructs him to prepare, clean and clear stock display area in accordance with the company's set procedures. Kumar achieves the desired task through the following activities:

- Clearly identifying stock to be displayed.
- Locating the area where stock would be displayed.
- Formulating design and arrangement of display.
- Determining size of the display.
- Determining time period for the display.

Once the display area is prepared, the next step is to collect all items and equipment to be displayed. Whenever an item or equipment is collected from the storeroom, the designated sales associate must make an entry of the type and quantity of material collected in the storeroom register.

# Team Activity

- Conduct a skill practice team activity.
- Divide the students in teams of 3-4 students.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Ask them to collect all relevant materials and equipment that would be required for display in a retail store.
- If required, ask them to bring rack display in the classroom.

Skill Practice	Time	Resources
Importance of Displays	1 Hour	Pencil and paper

# Tips 🗓

Some elements of effective visual merchandising that should be considered by every retailer are:

- Balance
- Object size
- Colour
- Focal point
- Lighting
- Simplicity

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

#### Summarise



- Summarise store procedures that can allow retailers to determine their display requirements.
- Summarise the steps to prepare stock displays.
- Summarise the elements of effective visual merchandising.

#### - Notes



#### **UNIT 2.4: Legal and Statutory Requirements for Stock Display**

## - Unit Objectives



#### At the end of this unit, students will be able to:

- Define list of stock requirements
- Analyse stock and custom point-of-purchase display options
- 3. Explain legal and statutory requirements for stock display
- 4. Identify components of successful small retail businesses

#### 2.4.1. Stock Requirements List





Ask students if they know about stock requirements list.



- Stock requirements list, unlike MRP list, is a dynamic report giving up-to-date information about new material requirements, such as Planned Independent Requirements (PIRs), Issue Stock Transfer order, Sales orders and so on.
- A stock requirements list is the most up-to-date report of the given material/materials.
- Whenever there is a receipt or issue added to the material, the same is updated in stock requirements list on a real-time basis.

#### 2.4.2. Evaluating Stock vs. Custom Point-of-Purchase **Display Options**

### **Explain**



Explain evaluating stock vs. custom point-of-purchase display options:

- Immediate availability
- No minimums
- No deposit required
- Customisable

# **Example**

The law for stock displays in India states that:

- Labelling for packaged food items must clearly mention their nutritive value and expiry dates.
- Maximum Retail Price (MRP) for every item must be printed clearly on the packaging.
- Labelling should indicate clearly whether the packaged food item is vegetarian or non-vegetarian.

• Display for tobacco-containing products must carry a statutory health warning. The warning should also clearly indicate the no-sale policy of such products to minors.

Failure to abide by these legal and statutory regulations can invite strict punishments and penalties for retail store operators.



Fig. 2.3 Declaration Indicating that Sale of Tobacco Products to Minors is Illegal

#### **Resources to be Used**



Retail products like biscuit packets, juice packets, oil packets, curd packets etc.

### **Activity**



- Ask the students to collect 2-3 retail products and examine their packaging.
- Ask them to notice details on packaging such as MRP, nutritional value, warning (if any) etc.
- After 10 minutes, ask 2-3 students randomly to share their lists.
- Assist and help them to explain the meaning of any detail, as required.
- Ask the rest of the class if they have any different items in the list.

Skill Practice	Time	Resources
Evaluating Stock vs. Custom Point-of-	2 hours	Retail Products, Pencil and
Purchase Display Options	2 110013	paper

# Tips 🗓

Provide the following tips on components of a successful small retail business:

- The stock room
- Receiving and counting system
- The Point of Sales (POS) system

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise list of stock requirements.
- Summarise stock and custom point-of-purchase display options.
- Summarise legal and statutory requirements for stock display.
- Summarise components of successful small retail businesses.

- Notes 🗐 ———————————————————————————————————	
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#### **UNIT 2.5: Importance of Labelling Materials and Equipment**

#### **Unit Objectives**



#### At the end of this unit, students will be able to:

- 1. Understand the importance of labelling materials and equipment
- 2. Identify different retail labelling solutions
- 3. List guidelines for product labelling
- 4. Justify use of labelling systems in retail environment

#### 2.5.1. Importance of Labelling Equipment

#### **Ask**



Ask the students if they have observed products labels.

#### **Notes for Facilitation**



- Explain the importance of labelling products.
- Mention the techniques of labelling.

#### Say



- The importance of labelling is that it provides proper description of products in a retail store.
- Barcoding and radio-frequency identification (RFID) are some modern labelling technologies used in retail stores nowadays.
- Labelling fulfils several critical functions regarding product information, utility, ingredients, as well as legal and statutory requirements.

#### **Resources to be Used**



A retail product like a packet of chips.

#### **Practical**



- Show a retail product.
- Explain the product label with the description of the product.

#### 2.5.2. Retail Labelling Solutions





Ask the students the different types of tags they have observed while visiting retail stores.

#### **Notes for Facilitation**



Note down the key responses on the flipchart and try to categorise them.



- Retail Labelling Solutions used by most of the retailers are given below:
  - Product labels
  - Hang tags
  - Expiration date marking
- It is the duty of a Trainee Associate to report any inaccuracy or misgivings on the product label to the concerned authority, with valid reasons for the same. These reasons could include printing errors, or misguiding, insufficient or illegal information related to the product.

#### **Role Play**



- Ask two students to come forward for a role play on reporting any inaccuracy or misgivings on the product label.
- Ask one of the students to play the role of a trainee associate in an affluent, multi-brand electronics store. He/she needs to report to his/her supervisor about a recently launched range of microwave ovens in their store.
- Ask the other student to play the role of the supervisor.
- Ask them to mimic the situation.
- Tell that the trainee associate needs to play wisely in such situations.
- Provide feedback at the end of the role play on what could have been better.
- If the time allows, conduct the same role play with another pair of students.



Provide the following tips on the labelling system:

- Labelling systems offer labelling equipment ranging from manual label dispensers to fully automatic integrated systems.
- Labelling systems are constantly improving labelling technology in the retail environment.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the importance of labelling materials and equipment.
- Summarise different retail labelling solutions.

- Summarise guidelines for product labelling.
- Summarise the use of labelling systems in retail environment.

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#### **UNIT 2.6: Excess Material and Equipment**

#### - Unit Objectives 🍱



#### At the end of this unit, students will be able to:

- Discuss ways of disposing excess material and equipment
- 2. Explain how to store surplus inventory
- 3. Discuss ways to design more effective store displays

#### 2.6.1. Ways of Disposing Excess Equipment





Explain the importance of disposing off surplus materials and equipment.

# **Example**

While organising displays in a shoe store, staff members display shoe models on racks while their boxes are immediately cleared away. Shoes are cleaned properly before being put out for display. In addition, unwanted or older models are restored safely in the storeroom.



Fig. 2.4 Disposing Excess Materials

#### **Resources to be Used**



Participant handbook and pencil.

#### Exercise



- Ask the students to refer to their participant handbooks for the activity of unit 2.6 and sub unit 2.6.1 of module 2.
- Ask them to look at the pictures and tick the picture that represents stock display.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.
- Ask students to complete the exercise given in their guides.
- Assist them in completing the exercise, if required.



- Summarise the ways of disposing excess material and equipment.
- Summarise how to store surplus inventory.
- Summarise ways to design more effective store displays.

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# 3. Planning and Preparing Visual Merchandising Displays

- Unit 3.1 Understanding Visual Design
- Unit 3.2 Finding Out the Display Needs for Framing a Design Brief
- Unit 3.3 Role of Visual Display in Marketing, Sales and Promotional Campaigns
- Unit 3.4 Identifying and Contacting a Visual Merchandiser
- Unit 3.5 Arranging and Monitoring Merchandise Delivery and Updating Stock Records
- Unit 3.6 Visual Merchandising Display



#### Key Learning Outcomes 💆

#### At the end of this module, students will be able to:

- 1. Understand the importance of visual merchandising
- 2. Identify company policies pertaining to visual designs
- 3. Explain display needs that lead to a store design
- 4. Identify prospective places for display
- 5. List various elements of display
- 6. State how to monitor merchandise delivery
- 7. Explain the approaches to design displays for merchandise
- 8. Discuss promotional campaigns
- 9. Describe the elements of display

#### **Notes for Facilitation**



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

#### **UNIT 3.1: Understanding Visual Design**

#### **Unit Objectives**

#### At the end of this unit, students will be able to:

- 1. Explain visual design
- 2. Explain visual design policies for retail stores
- Define visual design brief
- 4. List basic elements of visual design

#### 3.1.1. About Visual Design





Ask the students what they know about visual design from their experience of visiting retail stores.



- Visual design lays emphasis on the site aesthetics along with materials associated with it by implementing and applying fonts, colours, images and elements.
- An effective visual design Improves the visual appeal of the store by displaying the products in an attractive manner, thereby creating customer interest and building their trust in the brand.

#### 3.1.2. Visual Design Policies





Retail stores follow a specific visual design policy, which enlists various procedures and protocols to be followed for displaying products in the store.



Ask the students to refer to section 3.1.2 in the Participant Handbooks for a table explaining a number of aspects that should be considered while framing a visual design policy.

#### Team Activity 🍱



- Conduct a skill practice team activity.
- Divide the students in teams of 3-4 students.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Ask students to devise a suitable visual display policy related to selection of products, so that

items can be displayed attractively.

- Provide the following tips that should be considered:
  - » Clear estimation of customer needs
  - » Trends related to product demand in the market.
  - » Selection of products to display based on existing customer demands.
  - » Deciding suitable product size.
- Ask the students to discuss in their teams and come up with a visual display policy and use Internet if required.
- Tell them that the team with the best policy will be the winner.
- Tell them to choose a representative from their team and explain their findings out loud in the class one at a time.
- Make the class applaud the winning team with a clap.

Skill Practice	Time	Resources
Devising a Visual Display Policy	30 mins	Pencil and paper

#### 3.1.3. Visual Design Brief





#### Explain the following information of a visual design brief:

- Pattern of Displaying Products
- Display Budget
- Specific Expectations and Objectives of the Store
- Type of Graphics Required
- Target Audience



#### Provide the following tips about the visual display:

- Make a focal point on the window display so as to view the items easily.
- Then, synchronise every component of the display in order to keep neatness as well as to direct the viewer eyes to every component of display.

#### 3.1.4. Basic Elements of Visual Design





#### Based on the previous discussions, elaborate on the following elements of visual design:

- Shapes
- Lines

- Texture
- Colour palette combinations and choices
- Form
- Typography

#### Tips

#### Provide the following tips about the visual display:

- The design principles include novelty, variety, harmony, unity, balance, proportion, emphasis, contrast, rhythm and pattern.
- The means of successful visuals in a retail environment are design elements and principles.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the meaning of visual design.
- Summarise visual design policies for retail stores.
- Summarise the concepts of visual design debrief.
- Summarise the list of basic elements of visual design.

Notes 🗐 –			

# **UNIT 3.2:** Finding Out the Display Needs for Framing a Design Brief

#### - Unit Objectives

#### At the end of this unit, students will be able to:

- 1. Explain the basis of a design brief
- 2. Analyse how to maintain visual appeal of the store
- 3. Discuss principles of creating a visual design
- 4. Prepare design brief to identify stock to be displayed

#### 3.2.1. Framing a Design





Ask the students what factors they will consider before preparing a visual design brief.

#### **Notes for Facilitation**



- If required, initiate a discussion on this topic.
- Note the key discussion points on a flipchart and then introduce the factors to be considered in this regard.

#### **Explain**



• Explain the following factors:

Colour preferences of the store

Graphic preferences of the store

Existing graphic content used for display

Deadline for completing product display

Size of various products to be displayed

Fig. 3.1 Factors to be considered while framing design

#### Tips



#### Provide the following tips about the visual display:

- Additional budget is assigned in order to develop the externals and facades of the store appearance, as such things will be firstly noticed by the street people.
- The attractive appearance of the store is maintained by using landscapes, banners, entrance, awnings, marquees and signage.
- Unique mouldings and carvings or significant colours which signify the business are used in order to easily identify once store among other different ones.

#### 3.2.2: Principles for Creating a Visual Design

#### Say



The following points must be kept in mind while figuring out on how to use the basic elements we just discussed:

- Alignment
- Contrast
- Repetition
- Balance
- Proximity

#### **Team Activity**



- Conduct a skill practice team activity.
- Divide the students in same teams as in the last activity.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Ask students to devise a visual design brief that would enable them to correctly identify stock to be displayed in a retail store.
- Provide the following tips that should be considered:
  - » Name of the store/organisation.
  - » Functions of the store/organisation.
  - » Specific goals or objectives of the store/organisation.
  - » Major competitors of the store/organisation.
  - » Preferred display colour of the store/organisation.
  - » Target customers of the store/organisation.
  - » Size of stock to be displayed.
  - » Approved budget for product display.
  - » Any other demands/requirements.
- Ask the students to discuss in their teams and come up with a visual design debrief and use Internet if required.

- Tell them that the team with the best debrief will be the winner.
- Tell them to choose a representative from their team and explain their findings out loud in the class one at a time.
- Make the class applaud the winning team with a clap.

Skill Practice	Time	Resources
Devising a Visual Design Debrief	30 mins	Pencil and paper

## Tips

#### .

Provide the following tip about the visual design debrief:

Smaller shelves help in providing sufficient space for the eyes of buyers to look at products closely inside the outlet, if the distance between the ceiling and floor is less than ten feet.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the basis of a design debrief.
- Summarise how to maintain visual appeal of the store.
- Summarise the principles of creating a visual design.
- Summarise design brief to identify stock to be displayed.

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#### UNIT 3.3: Role of Visual Display in Marketing, Sales and **Promotional Campaigns**

#### **Unit Objectives**



#### At the end of this unit, students will be able to:

- Demonstrate the role of visual display in marketing
- 2. Explain about visual display promotional campaigns
- 3. Recognise what influences customers' behaviour
- List visual elements that create a good impression on shoppers

#### 3.3.1. Role of Visual Display





Ask students what attract them the most to purchase something when they visit a retail store in a shopping mall.

#### **Notes for Facilitation**



Explain that it is the visual display that draws attention of potential customers, influences you to make an impulse purchase and encourage repeat purchases.



Fig. 3.2 Drawing Attention of Potential Customers

#### Provide the following tips:

- One of the best ways to create the best impression on your customers is by adding light music, little classic aroma along with some dramatic and attractive lighting in your outlet. Here you can add design value which is implemented by the design team.
- Also, it is essential to match your target market's culture along with your type of ambiance with current lifestyle.

#### 3.3.2. Promotional Campaigns

#### **Notes for Facilitation**



Explain the importance of promotional campaigns.

#### Say



- Your business is successful when people buy more from you, when customers make purchases frequently or in greater volume, or when increased business happens during the non- peak hours and in off seasons.
- By creating timely sales promotion, which is relevant to the target customers, you will be able to reward the right actions, get them to respond, and grow your business in the process.

#### Field Visit



- Conduct a field visit to a nearby and big retail store, preferably in a shopping mall.
- Ask students to observe its displays and promotional strategies to attract customers.
- Assist them, whenever required, and resolve their queries.
- Ask them to prepare a report on these topics.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

#### Summarise



- Summarise the role of visual display in marketing.
- Summarise the visual display promotional campaigns.
- Summarise what influences customers' behaviour.
- Summarise visual elements that create a good impression on shoppers.

#### Notes



#### **UNIT 3.4: Identifying and Contacting a Visual Merchandiser**

### Unit Objectives 🤎

#### At the end of this unit, students will be able to:

- 1. Discuss the role of a visual merchandiser
- 2. Evaluate overall colour schemes of merchandising

#### 3.4.1. Visual Merchandiser





Ask the students if they know who a visual merchandiser is.

#### **Notes for Facilitation**



- If required, initiate a discussion on these topics.
- Note the key discussion points on a flipchart and then introduce the term.

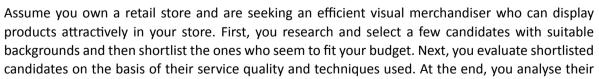
#### **Explain**



- Elaborate on the definition of a visual merchandiser:
  - » A visual merchandiser is responsible for entire planning and organising of the display of items in a retail store. His/her objective is to enhance visual display of the store for marketing and promotional purposes.
- Elaborate on the following factors can help retailers to identify the right candidate for the role:
  - » Targeted audience of the store
  - » Service quality of the merchandiser
  - » Techniques used by merchandiser in past roles
  - » The merchandiser's overall experience and reputation
  - » Cost associated with employing the merchandiser

overall experience and reputation, and arrive at the final decision.

## Example 🗣



#### Resources to be Used



Participant handbook and pencil

### **Exercise**

- 1. Ask the students to refer to their participant handbooks for the activity of unit 3.4 and sub unit 3.4.1 of module 3.
- 2. Ask them to look at the pictures and tick the pictures that represent activities necessary for visual merchandising planning.

## Tips 📮

#### Provide the following tips:

- Variation is one of the ways to support your store theme as it helps in removing monotony in decoration and display.
- Every year you may use the similar kind of theme. However, it is advisable to avoid similar kindof style and display.
- It is important for you to create a newer and more attractive look to generate the viewer's interest.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

#### **Summarise**



- Summarise the role of a visual merchandiser.
- Summarise overall colour schemes of merchandising.

#### - Notes



# UNIT 3.5: Arranging and Monitoring Merchandise Delivery and Updating Stock Records

#### - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Manage merchandise delivery
- 2. Explain how to arrange and receive merchandise delivery
- 3. Discuss ways to monitor progress of merchandise delivery
- 4. List advantages of updating stock records

#### 3.5.1: Merchandise Delivery

#### **Explain**



Explain the following aspects to ensure effective arrangement as well as monitoring of merchandise delivery:

- Appropriate packaging
- Proper labelling
- Proper documentation
- Insuring merchandise
- Tracking delivery

#### **Field Visit**



- Conduct a field visit to a nearby and big retail store, preferably in a shopping mall.
- Ask students to interview the retailers to know how they arrange and receive merchandise delivery.
- Ask them to observe the arrangement and receipt of merchandise delivery prior to displaying products in the retail store.
- Assist them, whenever required, and resolve their queries.
- Ask them to prepare a report on these topics.

#### **Elaborate**



#### Elaborate on reports to mention that:

Every retailer must maintain proper legal documents to ensure efficient preparation and receipt of merchandise delivery before displaying items in the store. The retailer must efficiently track the merchandise while in transit and ensure that it is received as per set guidelines. While receiving the merchandise, employees must check product packing and labelling thoroughly, inspect received merchandise for possible damage or defects, and make arrangements for the safe storage of the merchandise in a warehouse.

# Role Play

- Ask two students to come forward for a role play to monitor the progress of merchandise delivery.
- Ask one of the students to play the role of a store manager at a retail store recently placed an order for merchandise a supplier.
- Ask the other student to play the role of the supplier who receives a call from the manager to check the progress of delivery.
- Ask them to mimic the situation.
- Provide feedback at the end of the role play on what could have been better.
- If the time allows, conduct the same role play with another pair of students.

#### 3.5.2. Updating Stock Records



Keeping stock records updated is very important for a retail organisation as it helps to:



Fig. 3.3 Benefits of Keeping Stock Records Updated

# **Explain**

Explain the two main types of inventory systems that one can choose for a business:

- Periodic inventory system
- Perpetual inventory system



#### Provide the following tips:

• Retail is subject to trends, changing demographics and seasonal ups and downs.

 You can run a beautiful store with excellent customer service. However, to ensure customer interest is created in products you offer, you must follow trends and be updated on seasonal variations.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise how to manage merchandise delivery.
- Summarise how to arrange and receive merchandise delivery.
- Summarise ways to monitor progress of merchandise delivery.
- Summarise advantages of updating stock records.

- Notes 🗐 ———————————————————————————————————	

#### **UNIT 3.6: Visual Merchandising Display**

#### - Unit Objectives

#### At the end of this unit, students will be able to:

- List multiple approaches for displaying merchandise
- 2. Identify potential places for displaying products
- 3. List different elements of display
- 4. Recognise innovative and effective methods to improve visual effects

#### 3.6.1. Designing Displays for Merchandise

#### Explain



#### Explain the following approaches for displaying merchandise:

#### Single Item Display

As name suggests, only a single product is displayed. For example, a branded luxury women's wear, brand new car model, etc.

#### Range of Display

In this approach, whole range for one particular product type is displayed based on the product's size, style and colours.

#### Related Items in Display

In this approach, displayed products are associated with one an other such that they complement one another. For example, toothpaste and toothbrush.

#### **Display Variety**

In this approach, a range of unrelated items are putondisplay. For example, tea, soap, salt, chocolates, etc.

Table 3.4 Approaches for Displaying Merchandise

#### Field Visit



- Conduct a field visit to a nearby shoe retail outlet.
- Ask students to enquire about the techniques used by the staff for displaying different products.
- Ask them to identify different techniques that can be used for designing displays for different merchandise in a retail store.
- Assist them, whenever required, and resolve their queries.
- Ask them to prepare a report on these topics.



#### Provide the following tips:

- Retail stores need customers to buy their products. Without a steady supply of new and repeat customers, you won't succeed.
- A successful retail store caters to loyal customers by providing the goods they demand, while the displays support this strategy. They pay attention to customers' needs and cultivate relationships.

#### 3.6.2. Potential Places for Displaying Products

#### **Explain**



Explain the following aspects to identify a suitable location to display merchandise:

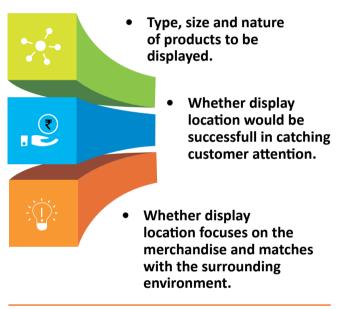


Fig. 3.5 Aspects to consider while Identifying a location to Display

#### Explain the potential places for displaying products in a retail store:

- Shelves
- Gondolas
- Round racks
- Wall display

# Resources to be Used



Participant handbook and pencil

#### **Activity**



- Ask the students to refer to their participant handbooks for the activity of module 3.
- 2. Ask them to look at the pictures and tick the pictures that represents a good display pattern.

#### 3.6.3. Elements of Display

#### Explain

#### Explain the following elements of display:

- Colour
- Space
- Product information
- Marquee

#### **Field Visit**



- Conduct a field visit to a nearby multi-brand retail store.
- Ask students to analyse the different elements of display adopted by the store staff.
- Assist them, whenever required, and resolve their queries.
- Optionally, ask students to make this visit by their own and share their findings.

### Tips



#### Provide the following tipsto adopt innovative and effective methods to improve visual effects:

- Your manager at a leading garment retail store can plan to undertake steps to improve the store's visual effects in order to attract customers to the store.
- You can, then, help your manager to decide upon a proper display location and lighting system for the store.
- You must also adopt a soothing and attractive colour combination. In addition, you must ensure
  to de-clutter the store and make adequate space for an easy movement of customers.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.
- Ask students to complete the exercise given in their participant handbook.
- Assist them in completing the exercise, if required.



- Summarise multiple approaches for displaying merchandise.
- Summarise potential places for displaying products.
- Summarise different elements of display.
- Summarise innovative and effective methods to improve visual effects.

Notes 🗒 ———————————————————————————————————	





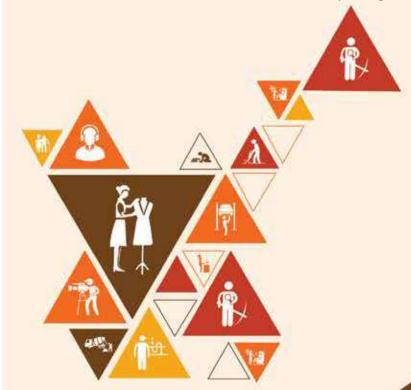






# 4. Dressing of Visual Merchandising Displays

- UNIT 4.1 Companies' Visual Design and Merchandising Policies
- UNIT 4.2 Creation of Focal Points within Display and their Use
- UNIT 4.3 Dressing Mannequins and Dressing Techniques for different Merchandise
- UNIT 4.4 Creating an Atmosphere with Types, Directions, and Levels of Light
- UNIT 4.5 Selecting Combinations of Shape, Colour, Texture, and Lighting for Visual Effects
- UNIT 4.6 Reporting Health and Safety Guidelines for Displays



#### Key Learning Outcomes 💆

#### At the end of this module, students will be able to:

- State organisational policies pertaining to visual design and display 1.
- 2. Ensure legal requirements for pricing and ticketing are followed
- 3. Describe different procedures of displaying different types of products
- 4. Explain procedures of dressing merchandise
- 5. Analyse the procedure of preparing creative displays
- Identify various visual elements used while creating visual effects 6.
- 7. List various health and safety guidelines involved in merchandise display
- 8. Arrange how to report discrepancies related to displays

### Notes for Facilitation



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

#### **UNIT 4.1: Companies' Visual Design and Merchandising Policies**

#### Unit Objectives

#### At the end of this unit, students will be able to:

- 1. Recognise the importance of visual design and merchandising
- 2. List objectives of visual display
- 3. Identify types of merchandising display approaches
- 4. Recognise selling features of merchandise
- 5. Outline legal requirements for pricing and ticketing products

#### 4.1.1. Importance of Visual Designing and Merchandising

#### Explain



- Explain the importance of visual design and merchandising.
- Explain that retailers formulate different policies for displaying their merchandise in the most attractive manner. Some basic policies adopted by retailers include the following:
  - o Improving Accessibility of Products on Display
  - o Stocking Less but Popular Products in the Store
  - o Arranging Products in a Neat and an Organised Manner
  - Using Suitable Displays Depending on Type of Merchandise
  - o Placing Relevant Props Near Displayed Items to Enhance Visual Effect
  - o Displaying Mannequins Such That are Easily Visible from Different Angles

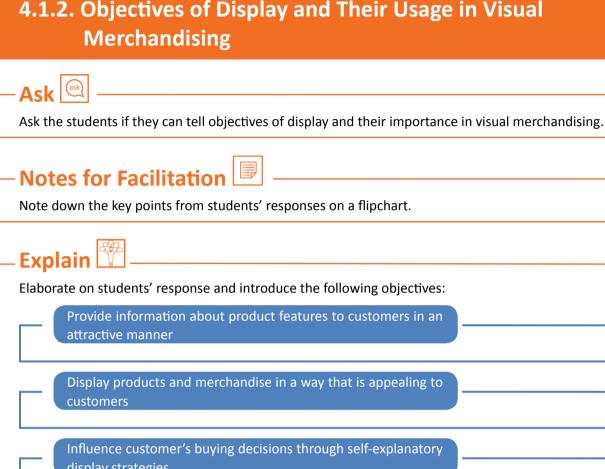


Fig. 4.1 Stocking Less but Popular Products in the Store



Fig. 4.2 Displaying Mannequins Such That
They are Easily Visible from Different
Angles

# 4.1.2. Objectives of Display and Their Usage in Visual



display strategies

Introduce new products in an attractive and appealing manner

Explain product features to customers through creative ideas

Boost sales of the retail store

Create long-lasting impression on customers' minds

Importance of Display in Visual Merchandising Fig. 4.3

#### 4.1.3. Types of Merchandise Display Approaches



Ask the students the merchandising displays they have seen while shopping.

#### Say



Explain variety of approaches to display merchandise:

- **Storefront Window Display: Such d**isplays are those which open up to a street, courtyard or shopping mall.
- **Found-Space Display: Such d**isplays are that which make use of small and/or non-usable areas in the store.
- Showcase Display: These displays are those which are usually located in dense traffic areas.

#### Example



Akshay works as a Trainee Associate at a retail store. His store manager assigns him the responsibility of changing the current display of stock to make it more informative and attractive. Akshay achieves the desired task through the following activities:

- He uses storefront window display for the area of store that opens up to shopping mall passage.
- He uses the concept of found space display in order to make sure that some small and nonusable areas in the store are used.
- He uses the concept of showcase display for that area of store which usually turns into dense traffic area.

#### **Team Activity**



- Conduct a skill practice team activity.
- Divide the students in teams of 3-4 students.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Ask them to examine various types of merchandise displays.
- Ask the students to discuss how the display can be improved, depending on the kind of products it is selling.
- Ask the students to prepare a report based on their observations.
- Tell them to choose a representative from their team and share their reports.
- Correct the teams' observations, as required.
- At the end, select one team with the best observations and make the rest of the class applaud for them.

Skill Practice	Time	Resources
Analysing Merchandise Displays	30 mins	Pencil and paper

# 4.1.4. Identifying the Selling Features of Merchandise to be Displayed

#### Say



The selling features can be identified by considering various factors, such as whether the product is to be sold at the MRP or at a discounted price, whether other offers or free gifts are to be given away with the product.

#### 4.1.5. The Importance of Add-on Sales





Ask the students what they know about add-on sales and their advantages.

#### **Elaborate**



#### Elaborate on students' responses:

- Add-on sales refer to selling related products along with the main product for example, selling
  of a manicure/pedicure kit along with a facial one.
- The advantage of add-on sales is that retailers can present a number of products in the same display area. In addition, customers can readily access related products from the same location, thus making their buying experience easier.

#### 4.1.6. Legal Requirements for Pricing and Ticketing

#### **Explain**



#### Explain the legal requirements for pricing and ticketing products:

The labels should clearly state the product's MRP as well as the manufacturer's name and address.

Labels must clearly state any statutory warning related to the products.

Labels must provide 'directions for use' for products; especially for products related to food, health and beauty.

Labels should state relevant terms and conditions related to the products.

Fig. 4.4 Legal Requirements for Pricing and Ticketing Products

#### 4.1.7. Different Types of Merchandise





Ask the students the types of merchandise they think are available.

#### **Notes for Facilitation**



- Note down the students responses on a flipchart.
- Explain the various types of merchandise.

#### Say



- Fad Merchandise: This type of merchandise is sold only for short rations but attract shuge sales; for example, sale of movie tickets.
- Staple Merchandise: This type of merchandise generates steady demand among consumers; for example, bread, rice, wheat, pulses and cooking oil.
- Seasonal Merchandise: This type of merchandise is sold only during a particular season; for example, specific clothing for summer and winter seasons.
- Fashion Merchandise: This type of merchandise has short-term demand and changes with updating fashion trends; for example, watches, apparel, footwear, and other fashion accessories.

#### Resources to be Used



Computer and Internet

#### **Activity**



- Ask the students to search for at least 10 merchandise items in the retail lab.
- Ask them to use their understanding and categorise them under the categories below:
  - » Fad Merchandise
  - » Staple Merchandise
  - » Seasonal Merchandise
  - » Fashion Merchandise
- After 10 minutes, ask 5-6 students randomly to share their lists.
- Correct the categorisations, as and when needed.
- Ask the rest of the class if they have any different items in the list.

Skill Practice	Time	Resources
Different Types of Merchandise	30 mins	Pencil, paper

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the importance of visual design and merchandising.
- Summarise the objectives of visual display.
- Summarise types of merchandising display approaches.
- Summarise selling features of merchandise.
- Summarise legal requirements for pricing and ticketing products.

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#### UNIT 4.2: Creation of Focal Points within Display and their Use

# -Unit Objectives 💆



#### At the end of this unit, students will be able to:

- 1. Define focal point of display
- Recognise need to clearly identify focal points of display
- 3. Identify ways to set up merchandise display in store
- 4. Choose suitable type of grouping strategy

#### 4.2.1. Focal Points of Display





Ask students to search Internet and see images of focal point.

#### **Notes for Facilitation**



Explain the term and importance of focal points.



- The point that appeals the most to customers when they first view a display is called the focal point of display. The focal point is important because it instantly catches customers' attention.
- Retailers can identify focal points of display by carefully listing products that customers look at frequently and products that bring premium sales for the store.
- Focal points of displays can be created inside or outside the retail store.
- Focal points of displays can be created by:
  - o Identifying the store area that attracts major customer attention
  - o Marking that area as a focal point

#### 4.2.2. Setting up Merchandise Display in a Store



#### Explain how to set up merchandise display in a store:

- In group display, similar products are placed together with the intention of increasing add-on sales. For example, toothpastes and toothbrushes are generally placed in close vicinity.
- In addition, different but related products are also displayed together. For example, gloves are displayed alongside sweaters. Moreover, merchandise displays are changed, cleaned and organised regularly to attract more customers.

#### Field Visit



- Conduct a field visit to a nearby retail store.
- Divide students into teams of 3-4 students each.
- Ask students to examine the products display and discuss the following among their teams:
  - o Which products can be grouped together depending on factors, like selling features of products, purpose and style of display, and visual effect.
  - o Whether products grouped together are aligned with the requirements and objectives of the display.
- Assist them, whenever required, and resolve their queries.
- Ask them to prepare a report on these topics.

#### 4.2.3. Selecting a Suitable Type of Grouping Strategy

#### Say



- The retailer needs to clearly identify related or unrelated products and also if these products can be grouped on the display.
- It must also be decided if all bestselling products can be grouped together, whether grouped products have similar selling features, and if the display space would be sufficient to place all grouped products. Before grouping products, it is important to decide on the kind of visual effects to be created in order to attract maximum customers.

# Tips 🗓

#### Provide and explain the following tips for grouping goods:

- The rule of three
- Making categories

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise focal point of display.
- Summarise the need to clearly identify focal points of display.
- Summarise ways to set up merchandise display in store.
- Summarise suitable type of grouping strategy.

# UNIT 4.3: Dressing Mannequins and Dressing Techniques for Different Merchandise

## - Unit Objectives



At the end of this unit, students will be able to:

- 1. List important points to consider when dressing merchandise
- 2. Identify dressing and display techniques
- 3. Demonstrate various types of displays used in a retail store
- 4. Recognise critical elements of display

# 4.3.1. Important Points Considered by Retailers for Dressing Merchandise

### **Explain**



Explain the following aspects while dressing mannequins, busts and props that must be considered by a retailer:

Place displays in the best location in order to attract maximum customer attention.

Choose appropriate poses for mannequins, busts and props.

Ensure that products do not suffer any damage while being put on display on these props.

While dressing mannequins, it is advisable to remove one limb while putting on or removing clothes and then replace the limb to its original position.

## Example



Kavita works as a Trainee Associate at a retail store. Her store manager assigns her the responsibility of dressing mannequins. She executes her work by keeping these points in mind:

- She decides the best location, that is, centre and right corner of the retail store to place mannequins in order to attract maximum attention of customers.
- She goes for appropriate poses for mannequins.
- She also ensures that products do not suffer any damage while being put on display.

#### 4.3.2. Dressing and Display Techniques

#### Say



• Dressing and displaying techniques vary depending on the type of merchandise. For example, jewellry is usually displayed on busts, while mannequins are most suitable for displaying apparel

- Everything that a prospective customer first sees from the window display draws him/her to the store, to the signage that directs him/her around, and then, the merchandising displays catch his/her eye.
- In addition, merchandise can also be dressed in the following types of displays:
  - o Gandola
  - o Shelves
  - o Round racks
  - o Props

#### Do



Ask students to do an online search and see images of the types of displays.

## **Team Activity**



- Conduct a skill practice team activity.
- Divide the students in teams of 3-4 students.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Ask them to search online and analyse different types of displays and the kind of merchandise displayed through them.
- Ask the students to note down the characteristics of these displays.
- Ask the students to prepare a report based on their observations.
- Tell them to choose a representative from their team and share their reports.
- Explain the teams' observations, as required.
- At the end, select one team with the best observations and make the rest of the class applaud for them.

Skill Practice	Time	Resources
Analysing Display Techniques	1 Hour	Computer, Internet, Pencil and Paper

# Notes for Facilitation



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise important points to consider when dressing merchandise.
- Summarisedressing and display techniques.
- Summarisevarious types of displays used in a retail store.
- Summarisecritical elements of display.

# UNIT 4.4: Creating an Atmosphere with Types, Directions, and Levels of Light

## Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Explain the importance of lighting in retail store displays
- 2. Describe the smart ways of using lighting to highlight special merchandise
- 3. Identify common graphics, symbols and signage used in retail stores
- 4. Discuss ways to install creative displays

#### 4.4.1 Use of Lighting in a Smart Way





Use of lighting in a smart way is a good way to highlight particular merchandise, create separate space within the store, and enhance customer moods.

#### **Notes for Facilitation**



Provide examples of outlets like McDonald's and Mainland China lighting experience.

#### Explain



- Explain the various types of lighting used in retail stores:
  - · Primary lighting
  - · Secondary or accent lighting
  - · Atmosphere lighting
- Explain signage and graphics used in retailer stores and ask participants to refer to their Participant Handbooks to see their pictures.

#### **Field Visit**



- Conduct a field visit to a nearby retail store.
- Ask students to observe the position of merchandise, graphics and signage and discuss among themselves.
- Ask them to discuss how the position of these elements is important in attracting potential customers.
- Assist them, whenever required, and resolve their queries.

#### 4.4.2. Installing Creative Displays





Ask the students to recall any creative displays they have seen which influenced them.

#### **Elaborate**



Elaborate on students' responses and introduce the following aspects that should be considered:

- Props, prototypes, dressings, and fixtures to be used.
- Colour and shape of the display.
- Lighting and other visual effects surrounding the display.

# 4.4.3. Creating Visual Effects through Props, Prototypes, Dressings and Fixtures

### Say



- Visual effect in a retail store can be enhanced by using various elements, such as props, prototypes, fixtures and many others.
- For example, retail stores display life-size models of bedrooms or modular kitchens, allowing customers to imagine the effect that products, such as curtains, cushions or floor tiles will have at their homes.
- Dressings include mannequins, busts and hangers used for displaying Jewelry and apparel at retail stores.
- Fixtures include shelves, rack sand stands used for placing products, such as shoes, bags and watches.

## Example



Prem works as a Trainee Associate at a retail store. His store manager assigns him the responsibility to visualise dresses for children as to how they would look on them. Prem executes his work with the help of the following activities:

- He took kids' mannequins and dressed them.
- He chose theme wise scene creation, such as a party scenario for party dresses and a casual theme for casual dresses.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the importance of lighting in retail store displays.
- Summarise the smart ways of using lighting to highlight special merchandise.
- Summarise common graphics, symbols and signage used in retail stores.
- Summarise ways to install creative displays.

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#### **UNIT 4.5: Selecting Combinations of Shape, Colour, Texture** and Lighting for Visual Effects

## - Unit Objectives



#### At the end of this unit, students will be able to:

- Identify different elements to create effects
- 2. Discuss ways to use effects judiciously
- 3. Evaluate visual effects of displays
- Identify need to take suggestions from colleagues regarding visual display appeal

#### 4.5.1. Elements for Creating Effects





#### Explain different elements used to create striking effects in a retail store:

- Shape
- Lighting
- Colour
- Fragrance
- Texture or touch

#### 4.5.2. Using Elements Judiciously



- Retailers must use different visual elements so that they do not hamper or subdue the impact of other elements.
- For example, use of too much or not-so-popular fragrance in the store can divert customers' attention from actual products. Hence, each element should be used in appropriate measure.

#### 4.5.3. Evaluating the Visual Effects of Displays





Ask the students how they can evaluate the effectiveness of visual effects.

### **Explain**

Elaborate on students' responses to explain that effectiveness of visual displays can be analysed by assessing the customer footfalls and sales.

# **Example Q**

#### **Creating Displays as per Set Organisational Policies on Visual Effects:**

When Christmas approaches, retail stores try to create a festive and fantasy-like atmosphere by using props, such as Santa Claus, Christmas tree, balloons, bells, and gifts to enhance the store's overall visual effects.

## **Team Activity**



- Conduct a skill practice team activity.
- Divide the students in teams of 3-4 students.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Provide some pictures of retail stores and ask the students to examine special visual effects used to attract customers.
- Ask them to observe each and every detail, like colour, size etc., of those displays.
- Ask the students to discuss in their teams and decide how those effects might be effective in increasing the customer footfall.
- Ask the students to prepare a report based on their observations.
- Tell them to choose a representative from their team and share their reports.
- Initiate a discussion, as required.

Skill Practice	Time	Resources
Analysing Visual Effects of Displays	1 hour	Pencil, paper, pictures of retail stores

### **Tips**



#### Provide the following tip:

While lighting the store, retailer should clearly mention the direction and level of lighting to be used in the display area in the design brief.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.



- Summarise different elements to create effects.
- Summarise ways to use effects judiciously.
- Summarise visual effects of displays.
- Summarise the need to take suggestions from colleagues regarding visual display appeal.

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#### **UNIT 4.6: Reporting Health and Safety Guidelines for Displays**

#### - Unit Objectives 🎑



#### At the end of this unit, students will be able to:

- Identify mechanism for reporting of display concerns
- 2. List steps to report display issues
- Explain health and safety guidelines pertaining to merchandise display
- 4. Identify factors to be considered for retail floor displays

#### 4.6.1. Arrangement for Reporting Display Concerns



- Whenever faced with any problems relating to displays, the employees should immediately contact the store manager.
- If a customer reports any problem related to the display to staff members, it must be reported to the store manager without much delay.
- The store manager should, in turn, take immediate remedial measures to sort out the issues pointed out by staff and customers.

# Steps: Reporting Display Issues





STEP 1: Listen and understand the exact problem carefully.



STEP 2: Immediately empathise with the complainants' position to create a bond with them.



**STEP 3:** Offer a solution to their problem.



**STEP 4:** Execute the best solution.



STEP 5: If it cannot be resolved, report to store manager immediately.



STEP 6: Follow-up to ensure customer is completely satisfied.

#### 4.6.2. Basic Guidelines for Safety



Some health and safety guidelines that should be followed by retailers are:

Ensure that displays are clean and tidy at all times.

Ensure that displays are not damaged or broken and are safe for

Avoid using visual effects that may hamper customers' health,

Fig. 4.5 Health and Safety Guidelines

# Role Play

- Ask three students to come forward for a role play on depicting display related health and safety guidelines.
- Ask one of the students to play the role of a senior associate trainee employed at a leading, multibrand store.
- Ask the other two students to play the role of associate trainees.
- Tell that the senior associate trainee needs to let the associate trainees' know display related health and safety guidelines.
- Provide feedback at the end of the role play on what could have been better.
- If the time allows, conduct the same role play with another pair of students.

## Tips

#### Provide the following tips:

- Have a plan for merchandising
- Create a theme
- Refresh regularly
- Consider context
- Keep your displays clean and simple

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.
- Ask students to complete the exercise given in their guides.
- Assist them in completing the exercise, if required.



- Summarise the mechanism for reporting of display concerns.
- Summarise steps to report display issues.
- Summarise health and safety guidelines pertaining to merchandise display.
- Summarise factors to be considered for retail floor displays.

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# 5. Dismantle and Store

- UNIT 5.1 Dismantling and Protecting Retail Displays
- UNIT 5.2 Checking, Handling and Returning Retail Display Items
- UNIT 5.3 Safe Cleaning of Materials, Equipment and Display Sites
- UNIT 5.4 Storing Display Items Safely and Identifying Storage Space
- UNIT 5.5 Protective Packaging, Security Measure Requirements and Labelling Display Items
- UNIT 5.6 Record Keeping, Associated Risks, Reporting of Display Items and their Storage Place



#### Key Learning Outcomes 💆

#### At the end of this module, students will be able to:

- Illustrate methods of dismantling and safely storing retail displays 1.
- 2. Explain methods of handling display items that need to be repaired
- 3. Recognise unwanted materials
- 4. Recognise the need for maintaining records of display items
- 5. Identify risk factors associated with display items
- Discuss the importance of safe storage of display items 6.
- 7. Identify protective packaging and security measure requirements
- Practise how to store display items safely 8.
- 9. Discuss the risks associated with storage facilities and items
- 10. Describe the risks associated with the concerned person at store

# Notes for Facilitation



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

#### **UNIT 5.1: Dismantling and Protecting Retail Displays**

## Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Explain the meaning of dismantling retail display
- 2. Explain need to plan safe dismantling of displays
- 3. Identify ways to protect retail display parts while dismantling
- 4. Practice how to avoid damage to retail display parts
- 5. List precautions while dismantling mannequin

#### 5.1.1. Dismantling Displays

#### **Notes for Facilitation**



Explain the term 'dismantle'.

# Say



- In retailing, the term 'dismantle' signifies removing and disassembling merchandise from retail displays, such as shelves, racks, mannequins, display units, props, and other accessories.
- For instance, if you visit the same retail store regularly, you would notice that retail displays keep changing after certain intervals. This is due to the fact that stores often shuffle displayed products and replace them with other merchandise.

#### Do



#### Explain the importance of dismantling retail displays:

- Break monotony of displays.
- Display new and fresh stock.
- Identify damaged goods.
- Remove excess props and accessories.
- Make displays look more appealing and fresh.

## Tips



#### Provide the following tips:

- Care should be taken to dismantle logically, particularly when dealing with equipment or props above head height.
- Lighting and bulbs should be checked.
- New merchandise and props will need to be kept separate from old materials.
- Be aware of any dangers, e.g., spillages/leads/step ladders.

- Remember not to twist or turn when lifting objects.
- Work on a step ladder only for a maximum of 20–30 minutes.
- Carry only light materials and tools (up to 10 kg).

#### 5.1.2. Avoid Damage to Display Parts While Dismantling

#### **Notes for Facilitation**



Focus that the store staff must ensure utmost safety while setting up or dismantling displays in the retail outlet.

#### **Elaborate**



#### Elaborate this topic further and mention the importance of avoiding damage:

Save Costs	By preventing damage to display props and fixtures.
Save Valuable Time	Repairing damaged display parts is a time-intensive process.
Protect Merchandise	A damaged display may even damage the merchandise. For example, if a part of the apparel display unit is broken or damaged, it may tear the
	apparel hanging on it.

#### Say



While dismantling mannequins, their different body parts including arms, legs, torso, head, and base must be removed carefully and placed on a soft and clean surface.

## **Steps: Dismantling a Mannequin**





STEP 1: Understand your mannequins pose.



**STEP 2:** Unscrew first.



STEP 3: Dressing the mannequin.



STEP 4: Securing the hand back.



STEP 5: Give final touch (finishing) the mannequin.



STEP 6: Display of dressed mannequin.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

#### Team Activity



- Conduct a skill practice team activity.
- Divide the students in teams of 3-4 students.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Ask them to dismantle the mannequin as a team, one at a time.
- Ask them to follow the recommended steps.
- Tell them that the team who will perform this dismantling in the shortest time and with all correct steps will be the winner.
- Make the rest of the class applaud for the winning team.

Skill Practice	Time	Resources
Dismantling a mannequin	1 hour	A mannequin



- Summarise the meaning of dismantling retail display.
- Summarise the need to plan safe dismantling of displays.
- Summarise ways to protect retail display parts while dismantling.
- Summarise how to avoid damage to retail display parts.
- Summarise precautions while dismantling mannequin.

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#### **UNIT 5.2: Checking, Handling and Returning Retail Display Items**

## -Unit Objectives 🤎



#### At the end of this unit, students will be able to:

- Explain how to check the condition of retail display items before store opening
- 2. List strategies for store opening
- 3. Identify and remove unwanted materials
- 4. Identify damaged items in a retail store
- 5. Discuss ways to handle retail display for repair

#### 5.2.1. Steps Before Opening a Store

# -Steps: Preparing a Store before Opening 년





STEP 1: Lure customers in with the window display.



STEP 2: Make your entrance inviting.



**STEP 3:** Entice customers to the right direction.



STEP 4: Try unique design ideas.



STEP 5: Arrange Your Merchandise in a Self-Serviceable Manner.



STEP 7: Decorate in a Manner That
Customers Would Want to Linger.



**STEP 9:** Designate an Area for Inventory.



STEP 6: Use shelving space to its best advantage.



STEP 8: Encourage Impulse Buying at the Cash Register.



**STEP 10:** Customer service.

# Tips 🖳

#### Provide the following tips:

- Display should be changed at least once a month to keep customers attracted to the store.
- In case some product is sold from the display window, immediately after the sale that gap must be filled with other merchandise.

# Field Visit

- Conduct a filed visit to a nearby shopping mall, preferable when stores are open.
- Divide students into teams of 3-4 students each and assign each team a store to study.
- Ask students to examine the steps employees follow before opening the store. If the store is already opened, ask the employees about the steps they follow.
- Ask them to note their observations as a team and prepare a report.
- Assist them, whenever required, and resolve their queries

#### 5.2.2. Handling Retail Display Items to be Repaired





Repairing damages to display items attracts high costs as well as extra time for a retailer. Therefore, the retail manager and staff members should take proper care of various display items across the store.

#### 5.2.3. Identifying and Removing Unwanted Materials

## **Explain**



- Explain the importance of identifying and removing unwanted materials.
- Explain the various types of unwanted materials that can create a messy look in the store:
  - » Extra props lying on the floor
  - » Dismantled mannequins
  - » Damaged signboards
  - » Unused props
  - » Damaged display items

#### Tips



#### Provide the following tips:

- Always keep damaged items away from a retail store.
- All recyclable items can be put out for collection together.

#### 5.2.4. Returning Display Parts





Once unwanted materials and dismantled display parts that are out of use have been removed from the store, they need to be returned to the individual in-charge of retail displays.



Fig. 5.1 Damaged Display Items



Explain the importance of replacing damaged display parts.

#### 5.2.5. Issues Arising in Returning Display Parts





Ask the students if they can think of any issues that can arise in returning display parts.

#### **Notes for Facilitation**



Note the responses from students on a flipchart and elaborate on them.

#### Say



If retailers goods come to know about the dissatisfaction of customers regarding the displayed goods purchased by them if they find a much better product at a much lesser price elsewhere.

## Tips



#### Provide the following tips:

- Make your customer feel heard.
- Complaints arise when products don't touch the expectancy level of customers. Immediate solution is to first try to bring the customer into an agreeable frame of mind and then solve his problem.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

# Role Play



- Ask two students to come forward for a role play on issues that arise when returning display parts.
- Ask one student to play the role of a customer who is complaining about a defect in a display part.
- Ask the other student to play the role of the trainee associate who is trying to solve the customer's issues.
- Provide feedback at the end of the role play.
- Repeat this role play with 2-3 more pair of students



- Summarise how to check the condition of retail display items before store opening.
- Summarise strategies for store opening.
- Summarise how to identify and remove unwanted materials.
- Summarise how to identify damaged items in a retail store.
- Summarise ways to handle retail display for repair.

Notes 🗐 ——		

# UNIT 5.3: Safe Cleaning of Materials, Equipment and Display Sites

# - Unit Objectives

## **©**

#### At the end of this unit, students will be able to:

- 1. Describe the importance of using safe-cleaning materials and equipment
- 2. Explain how to clean mannequins
- 3. Explain ways to clean display units, props and display sites
- 4. Discuss best practices for handling mannequins

#### 5.3.1. Using Safe Cleaning Materials and Equipment





Retailers must ensure cleanliness of retail displays from time to time.

#### Do



Ask students to refer to their Participant Handbooks to see images of materials commonly used to clean retail displays.

# Tips

## Provide the following tips:

- Always keep a close eye on chemicals when in use and store them in their original containers.
- If children visit your store often, make sure that all cleaning chemicals and other hazardous materials are kept out-of-reach.

#### 5.3.2. Cleaning Mannequins

### Say



- It is advisable to remove the arms, legs, head, torso, and base of mannequins before cleaning.
- A damp cloth and detergent can be used for cleaning these parts properly.

#### 5.3.3. Cleaning Display Units, Props and Display Sites





Explain how to clean display units, props and display sites:

Display units Props Display sites

- These should be cleaned after dismounting the items with water, detergents, and cloth. Metal display units should not be cleaned using corrosive liquids or materials.
- These can be easily cleaned using soaps and detergents. Stuffed toys should be dry-cleaned to prevent damage.
- These can be cleaned with lemon juice, baking soda, hydrogen peroxide, non-oily sprays, alcohol and water, and materials, such as damp cloths, scrubbers, squeegees and mops. While cleaning dust, brooms, vacuum cleaners, dust pans and dusters can be used.



#### Provide the following tips:

- Remember to position mannequins in the best and most favourable angles, which display the best of the current clothing line.
- If the store has numerous mannequins, do not place them very close to one another.
- It is important to note that if display window is overcrowded and not attractive, the customers will frame a similar picture of the store in their minds. So, it is very important to have a well organised, coordinated and spacious window display.
- Although mannequins are prominent displays, they should not necessarily stand out. Rather they should blend into the surrounding as they display products.
- Make the display of group mannequins in such a way that they appear to be interacting with one another.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

# Resources to be Used



Computer and Internet



- Ask the students to search for at least 5 display units, props and display sites of their choice in the retail lab.
- Ask the students to analyse them and write down the cleaning materials and method they would use to clean them.
- After 10 minutes, ask 5-6 students randomly to share their lists.

Correct their notes, as and when needed.

Ask the rest of the class if they have any different items in the list.

Skill Practice	Time	Resources
Analysing Display Units, Props and Display Sites	1 hour	Display Units & Props



- Summarise the importance of using safe-cleaning materials and equipment.
- Summarise how to clean mannequins.
- Summarise ways to clean display units, props and display sites.
- Summarise best practices for handling mannequins.

- Notes 🗐 —		

#### **UNIT 5.4: Storing Display Items Safely and Identifying Storage** Space

### -Unit Objectives 🤎



#### At the end of this unit, students will be able to:

- Explain the importance of storing display items safely 1.
- 2. Identify whether storage facilities are safe and secure
- 3. Discuss ways to handle extra display items
- Identify suitable storage space of retail display items

#### 5.4.1. Storing Display Items



- The storeroom in-charge and store manager are responsible for ensuring safety of all display items in storage.
- They must ensure that all safety guidelines have been followed while storing these items and equipment, in order to avoid losses due to damage or theft.

#### Field Visit



- Conduct a field visit to a nearby retail store.
- Ask the students to enquire from the managers about various measures they undertake to ensure the safety of their storage facility.
- Assist them wherever required.
- Ask students to prepare a report on the basis of their findings.

#### 5.4.2. Handling Extra Display Items





Initiate a discussion on what should be done to handle extra display items.

#### **Explain**



Explain that a visual merchandiser needs to constantly check display items in terms of their appearance, safety and utility.



If display items, such as mannequins or props are underutilised, obsolete or damaged, they should be removed and stored away safely.

# **Example Q**

Let us assume, a shoe store has four shelves in a display unit, but only three shelves are sufficient for displaying the desired merchandise. In this case, the additional shelf should be dismantled and removed. It should be returned safely to the storeroom for any possible use in the future.

# Tips 🗓

#### Provide the following tip:

Remember to add some KAOS to store as it makes store livelier: Kinetic, Assortment, Over Communicate and Sale.

#### 5.4.3. Identifying Storage Space of Retail Display Items





The retailer must identify a suitable place for storing damaged or unused display items. A suitable and safe storage space is essential for preventing breakage or damage to stored items.

# Tips 🗓

#### Provide the following tips:

A theme should be followed while promotion display walls or tables are being set. The following arrangement and organisation must be done:

- Arrangement should be from 'light to dark'
- Arrangement should be from 'left to right'
- Arrangement should be from 'small to large'

#### **Notes for Facilitation**

- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the importance of storing display items safely.
- Summarise whether storage facilities are safe and secure.
- Summarise ways to handle extra display items.
- Summarise suitable storage space of retail display items.

# Field Visit

- Conduct a filed visit to a nearby retail store.
- Divide students into teams of 3-4 students.
- Ask the students to ask the store employees on how they handle extra display items and identify place to store damaged and unused display items.
- Ask them to note their observations as a team and prepare a report.
- Assist them, whenever required, and resolve their queries.

- Notes 🗒 ———————————————————————————————————

# UNIT 5.5: Protective Packaging, Security Measure Requirements and Labelling Display Items

#### **Unit Objectives**



#### At the end of this unit, students will be able to:

- Recognise the importance of protective packaging
- 2. Explain security measure requirements
- 3. Recognise the importance and need of labelling display items
- 4. Identify ways to label display items

#### 5.5.1. Identifying Protective Packaging





- While packaging display items, proper care should be taken to prevent damage or breakage due to dirt, dust or manual mishandling.
- The display items must be packed in an orderly and protective manner using materials, such as air bags, epe foam, thermocol, bubble wrap and cascades boxboard.

#### 5.5.2. Packaging Requirements





Ask the students what safety measures they would adopt while packaging retail display items.

## Explain



#### **Explain the following measures:**

- Use appropriate packaging materials that can prevent breakage or damage to display units.
- Check compatibility of packaging materials with display items.
- Use multiple packaging layers, especially for fragile and breakable materials.
- Use protective gears, such as goggles, gloves, breathing masks, boots, and dust suits while packing materials.

# Tips 🚇

#### Provide the following tips for packaging display items:

- Clarity and simplicity
- Shelf impact
- Practicality

#### 5.5.3. Storing and Labelling Process





Ask the students what they think is the significance of labelling display items.

#### Explain



- Explain the importance of labelling display items.
- Explain the following aspects:
  - » Similar display items should be grouped together.
  - » Grouped items must be placed in a particular section of the storeroom.
  - » This section must be properly labelled and should include information regarding handling, usage and security risk associated with display items stored in that section. For example, section containing breakable display items should feature a sign saying 'Fragile; Handle with care.

#### 5.5.4. Labelling Display Items

# Example



Assume you are an employee at a gift store. Your store has just wrapped up a season sale. As most merchandise was sold out, a lot of display units are now rendered empty before they can be filled again with fresh stock. Hence, you have been instructed to remove unutilised or unwanted display units and return them to the storeroom. You have been instructed to handle each display unit carefully. You have also been advised to group similar items together and label them appropriately to avoid confusion in future.

#### Tips



#### **Provide the following tips:**

- Remember not to use magnets or easily removable labels.
- Assure the readability of labels.
- Easy-to-spot colours must be used.
- Creation of label should be an easy task.
- Remember, the placing of labels should be in a manner that it does not obstruct normal activity
  or get easily damaged or tattered.
- Make sure that no two labels are the same.
- Labels should carry arrows that point to a location.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the importance of protective packaging.
- Summarise security measure requirements.
- Summarise the importance and need of labelling display items.
- Summarise ways to label display items.

Notes ————————————————————————————————————	
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# UNIT 5.6: Record Keeping, Associated Risks and Reporting of Display Items and their Storage Place

# -Unit Objectives 🛚



#### At the end of this unit, students will be able to:

- 1. Recognise the importance of keeping records of display items
- 2. Discuss importance of storage facilities
- 3. Analyse the risk associated with storage facilities
- 4. Explain reporting dangers and risk at work

#### 5.6.1. Keeping Records of Display Items

### Say



After storing display items safely, it is important for retailers to maintain proper records that indicate which items are stored where.

#### Explain



#### Elaborate further and introduce the following advantages of keeping records:

- Identify appropriate place for storing display items when multiple storage spaces are available.
- Differentiate between display items based on their status, such as fit for future use, to be repaired or to be sold off.
- Track when a display item was last used and by whom.

#### 5.6.2. Importance of Storage Place

## **Explain**



#### **Explain the importance of storage place:**

- A warm and damp storage facility gives rise to infestation and growth of micro-organisms; so a dry and cool storage facility is needed.
- Take steps to protect food items and supplies from direct sunrays, high temperature or humidity.
- Shelf-life and consumption rates must be taken into consideration by retailers and requests for supplies must be made in quantities which can be easily and properly managed.
- Only 20% over the needed floor area is allowed for ventilation and access.

#### Resources to be Used



Computers and Internet

## **Activity**

- Ask the students to think and list things they would consider to record and update while storing display items.
- 2. Ask them to do an online search if required.
- 3. After 10 minutes, ask 2-3 students randomly to share their lists.
- 4. Assist and correct them, as required and provide the following inputs:
  - Nature and number of display items stored.
  - Display items returned from the shop floor.
  - Damaged display items marked for disposal.
- 5. Ask the rest of the class if they have any different items in the list.

Skill Practice	Time	Resources
Recording and updating store display	1 hour	Pen, notepad,
items	1 11001	computer, internet

# Tips

#### Provide the following tips:

- Heavy product should be kept close towards the body while lifting and carrying so as to reduce back stress.
- While stocking frozen foods always use thermal gloves. This precaution is taken seriously as cold temperatures can reduce circulation which will cause stress on the hands.
- While working on labelling of frozen foods, remember to use a glove with coarse fingertips for wiping frost from frozen foods.
- To reach heights or store products kept on the top of high shelves or pallets, use a step stool.

#### 5.6.3. Storage Facilities





Though often overlooked, storage is one of the most crucial elements to a happy, healthy and organised living space or workspace. But all too often, storage is used in homes as well as in offices to conceal the piles of clutter that do not have a designated "place".

#### 5.6.4. Risks Associated with Storage Facilities

### **Explain**



#### **Explain the following risks:**

- High storage temperature
- Fire
- Natural calamities
- Chemical hazard

- Dirt and dust
- Theft
- Water spillage
- Human error

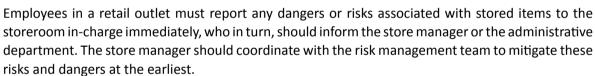


#### Provide the following tips:

- Estimation of the storage facility capacity
- Refrigeration equipment maintenance
- Storage facility maintenance
- Qualification of temperature-control storage area
- Security and fire protection of storage facilities
- Site selection of storage facility
- Transport operations featuring temperature-control
- Fixed storage areas with humidity and temperature monitoring systems
- Temperature mapping of storage areas

#### 5.6.5. Reporting Dangers





#### 5.6.6. Controlling and Reporting Risks at Work





Ask the students how they will control and report risks at work such as slip risks or falling.

#### **Explain**



#### Elaborate on students' responses:

- These risks and hazards can be controlled if employer follows the related laws.
- These laws direct employers to assess risks associated with young workers, implement measures to protect employees, follow rules regarding protective equipment supplies, work out the safest jobs for employees and provide supervision and training for the same.

# Tips 🗓

#### Provide the following tips:

One could help oneself by following guidelines given in safety rules, such as always using the equipment for which training has been provided, being aware about what is to be done in emergency, and last, but not least, working upon new risk exposure and finding ways to deal with them.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.
- Ask students to complete the exercise given in their guides.
- Assist them in completing the exercise, if required.



- Summarise the importance of keeping records of display items.
- Summarise the importance of storage facilities.
- Summarise the risk associated with storage facilities
- Summarise reporting dangers and risk at work.

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# 6. Preparing Products for Sale

Unit 6.1 - Arrangement of Products for Sale

Unit 6.2 - Assembling Products for Sale

Unit 6.3 - Handling Displayed Products

Unit 6.4 - Managing Damaged Products



#### Key Learning Outcomes 💆

#### At the end of this module, students will be able to:

- 1. Arrange products for sale
- 2. Design layout for products
- 3. Recognise tools for arranging product for sale
- 4. Assemble products for sale
- 5. Employ the manufacturer instructions for grouping and assembling products
- 6. Indicate problems in assembling products
- 7. Arrange displayed products
- 8. Identify the quality standard of organisations for displayed products
- 9. Implement the methods of handling damaged products

#### **Notes for Facilitation**



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

#### **UNIT 6.1: Arrangement of Products for Sale**

#### Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Describe how to arrange products for sale
- 2. Prepare layout for products
- 3. Identify the different tools for arranging products for sale
- 4. Discuss the importance of arranging products on top shelf

#### 6.1.1. Arranging Products for Sale

#### Tips



#### Provide the tips related to:

- Personal appearance, personal hygiene, and dressing as well as cleanliness of cash counters and other sections within the store
- New and up-coming market trends
- Proper lighting and colour scheme
- Price tags on products
- Product packaging

#### 6.1.2. Layout for Products





Ask the students what all items should be there on the top shelf and why.

#### **Notes for Facilitation**



- List the students' responses on a flipchart and mention that the following items should be there on the top shelf:
  - Smaller brands, which generally have budget constraints hence cannot opt for better placement
  - · Regional brands
  - Gourmet brands
- Explain that it gives "tone and texture" to the layout of shelf.

#### Resources to be Used



**Computers and Internet** 



- 1. Ask the students to think and list things they would consider before offering products for sale.
- 2. Ask them to do an online search if required.
- 3. After 10 minutes, ask 2-3 students randomly to share their lists.
- 4. Assist and correct them, as required.
- 5. Ask the rest of the class if they have any different items in the list.

Skill Practice	Time	Resources
Layout for products	30 Minutes	Computer Lab



#### Provide the following tip:

In case, you want to place some specific items on this shelf, you have to take necessary permission from the Store Manager.

#### 6.1.3. Tools for Arranging Products for Sale



#### Retail stores use different tools that help the staff in:

- Transferring or shifting products from one location to another without causing damage.
- Grouping or sorting out products and placing them on shelves or other display units.



Fig. 6.1 Tools Used for Handling Materials in Retail Stores



#### Provide the following tip:

While moving of materials either mechanically or manually, the employee must know and understand the possible hazards related to the work in hand.

#### Field Visit



- Conduct a field visit to a nearby retail store or nearby mall.
- Ask them to observe various products put out for sale.
- Ask them to observe whether products have been displayed suitably or if individual displays are underutilised or overutilised.
- Assist them, whenever required, and resolve their queries.
- Ask them to share their findings and observations with their classmates.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise how to arrange products for sale.
- Summarise layout for products.
- Summarise the different tools for arranging products for sale.
- Summarise the importance of arranging products on top shelf.

Notes 🗐			

#### **UNIT 6.2: Assembling Products for Sale**

#### - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Explain how to assemble products for sale
- 2. Apply manufacturer's instructions for grouping and assembling products
- 3. Interpret how to report problems related to assembling products
- 4. Define distribution centre
- 5. Identify different material handling equipment

#### 6.2.1. Grouping and Assembling Products

#### Say



When placing grouped products, the retailer should ensure that all products are visible and that they should not obstruct the viewing of one another by the customer. Unrelated products should ideally be presented on different displays.



Fig. 6.2 Displaying Similar Types of Products



Fig. 6.3 Displaying Unrelated Products

# **6.2.2.** Manufacturer's Instructions for Grouping and Assembling Products

#### **Explain**



- Explain the main tasks are to be considered while designing instructions for grouping and collecting products:
  - » Planning
  - » Presentation

#### **Explain the following key points:**

- Staff in a medical store should be careful while grouping and assembling products, like medicines, injections and glucose bottles.
- Medicines, ointments, chemicals, etc., should be handled with care.

#### 6.2.3. Storing Products





Products, like bicycles, televisions or music systems and computers are usually assembled within the storeroom and then transferred to the display area. Certain products, like furniture items are assembled near the display area itself as they are too bulky to be transported after assembling.

#### Tips

#### Provide the following tips:

- It is important for the workers to be careful while keeping blocks under a raised load.
- Also, make sure that the load is not released before removing their hands from under the load.
- In order to support the load carefully and properly, blocking materials used must be strong and large.

#### 6.2.4. Distribution Centre





Ask the students if they know what a distribution centre is.

#### **Elaborate**



Elaborate on students responses and explain what a distribution centre is: A distribution centre is a specialised building or a warehouse for goods or products with air conditioning or refrigeration and are also known as warehouses, DC, fulfilment centres etc.

#### 6.2.5. Material Handling Equipment





On arrival, products are stored in a distribution centre in different kinds of the containers and storage places as per the suitable characteristics of the product, and also as per the quantity which is to be stored and transported.

# Explain Explain Explain the common names and features of the storage containers: Pallets Intermodal Containers Cartons and Cases Gaylord Totes

#### 6.2.6. Reporting Problems in Assembling Products

# **Explain**

#### Explain how to report problems in assembling products:

- These problems must be dealt with appropriately and at the earliest to avoid losses later.
- In addition, such problems and challenges should be reported immediately to the store manager or visual merchandiser.

#### 6.2.7. Steps in Product Assembling

#### Steps: Assembling Products



STEP 1: Using the correct equipment for the assembly operations.



STEP 2: Carrying out product assembly in the correct sequence.



STEP 3: Monitoring the assembly operations.



STEP 4: Reporting problems to the appropriate person.

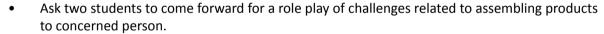


STEP 5: Completing any necessary documentation.



STEP 6: Working in ways which maintain your safety as well as of others.

#### **Role Play**



- Ask one student to play the role of a sales associate in a retail store who is facing certain issues while assembling products before display.
- Ask the other student to play the role of the visual merchandiser at the store.
- Provide feedback at the end of the role play.
- Repeat this role play with 2-3 more pair of students.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise how to assemble products for sale.
- Summarise manufacturer's instructions for grouping and assembling products.

- Summarise how to report problems related to assembling products.
- Summarise distribution centre.
- Summarise different material handling equipment.

- Notes =

#### **UNIT 6.3: Handling Displayed Products**

#### - Unit Objectives 🤎



At the end of this unit, students will be able to:

- Explain the need to check accurate assembly and safety of displayed products 1.
- 2. Identify quality standards for displayed products
- 3. Recognise need to maintain product quality
- 4. Discuss shelf layout decisions of retailers

#### 6.3.1. Checking Accuracy in the Assembly and Safety of **Displayed Products**





The products should also be in good condition, and should not be spoiled or damaged. Placement of products must also be appropriate so that customers can get a good view of the merchandise on sale.



Ask the students how they will determine if products have been assembled correctly and are safe for display.

#### Example



#### Some of the examples of products using "Safety Mark" are as follows:

- Regular appliances of household, for example, ceiling fans and irons
- Gas appliances, for example, regulators and hoses of LPG (Liquefied Petroleum Gas) cylinders
- Electrical appliances of kitchen such as kettles and rice cookers
- Accessories used in IT, for example, PCs (Personal Computers) and printers
- Appliances related to party, for example, decorative chains of lighting

#### 6.3.2. Quality Standard for Displayed Products





Some general quality standards include displaying best-selling products, keeping in mind new and upcoming market trends. In addition, waste and unwanted products should be removed immediately.

#### 6.3.3. Shelf Layout Decisions

#### **Explain**

#### -<del>13-7</del>-

#### **Explain the following points:**

- Many customers are uncertain and unclear about product satisfaction before conducting any physical inspection.
- Also, in retail store, search process may get affected by the design of the layout in the shelf.

#### Example



#### Some examples are:

- In an electronics section of departmental outlet, all microwave products are kept in one place side by side. The buyers of the microwave can simply examine different brands.
- In an apparel section of departmental outlet, a buyer searches for the sweaters of one brand against the sweaters of other brands.

# Tips 🗓

#### Provide the following tip:

Products such as gas, electronic and electrical appliances and their accessories need the ISI mark before these products are sold in India.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

#### **Summarise**



- Summarise the need to check accurate assembly and safety of displayed products.
- Summarisequality standards for displayed products.
- Summarisethe need to maintain product quality.
- Summariseshelf layout decisions of retailers.

#### Notes



#### **UNIT 6.4: Managing Damaged Products**

#### - Unit Objectives 🧖

#### At the end of this unit, students will be able to:

- 1. Explain handling of damaged products
- 2. Explain management of retail returns
- 3. Prepare a return authorisation
- 4. Explain how to handle unused waste

#### 6.4.1. Handling Damaged Products





Ask the students if they will handle damaged products.

#### Say



In such cases, the damaged products should be removed from the display carefully and sent to the storeroom for repair or disposal.

#### 6.4.2. Managing Retail Returns

#### **Explain**



• Explain how retailers deal with such types of return in order to get their maximum value from the logistics perspective.

# FORWARD LOGISTICS PART MODULES SUBASSEMBLY ASSEMBLY REMANUFACTURE CUSTOMER RAW PART FABRICATION REMANUFACTURE REPAIR REUSE REVERSE LOGISTICS

Fig. 6.4 Retail Logistics

- Explain that:
  - » The forward side of the logistics in retail continues from September to December; this involves moving high volumes of products into the distribution centres of e-commerce and stores.
  - » However, for reverse logistics, it is for the month of January, February and March.

#### 6.4.3. Creating a Return Authorisation

#### Say



If your customer is sending merchandise back to the warehouse, the system will automatically generate a Return Materials Authorisation (RMA) label, which must be placed on the returned product. This will ensure that the retail company can quickly add it back to their inventory while keeping a low inventory count.

#### **Field Visit**



- Conduct a field visit to a nearby supermarket or retail store, preferably when the store is handling the arrival of fresh stock.
- Ask students to interact with the staff about how they handle products that get damaged accidentally, and whether they follow set policies for handling such damages.
- Assist them, whenever required, and resolve their queries.

#### 6.4.4. Removing Unused Waste

#### Say



Discarded packaging and waste materials should be disposed off quickly to free space in the storeroom. These materials can be sold off as scrap to suppliers or recyclers.

#### Field Visit



- Conduct a field visit to a nearby retail store.
- Ask students to observe if they follow basic safety measures while handling waste.
- Assist them, whenever required, and resolve their queries.
- Ask them to share their observations with other classmates.

#### Tips 🚇

#### Provide the following tips of dealing with damaged goods:

- Separate the damaged goods from normal goods
- Move the damaged amounts to a separate location. If they are food commodities, make sure that these are in a place where the damage cannot spread
- Report the damage to the stock owner/supervisor
- Dispose off the damaged goods in the most transparent, cost-effective and environmentally
- responsible manner

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.
- Ask students to complete the exercise given in their guides.
- Assist them in completing the exercise, if required.



- Summarise handling of damaged products.
- Summarise management of retail returns.
- Summarise how to prepare a return authorisation.
- Summarise how to handle unused waste.

Notes 🗐 ———		











# 7. Loyalty Scheme Promotions

- Unit 7.1 Understanding Loyalty Schemes
- Unit 7.2 Loyalty Scheme Offers Specific to Members
- Unit 7.3 Responding to Customer Queries and Concerns about the Loyalty Scheme
- Unit 7.4 Preparing Customers to Register for a Loyalty Scheme
- Unit 7.5 Proof of Membership



#### Key Learning Outcomes 💆

#### At the end of this module, students will be able to:

- 1. List various characteristics of loyalty schemes offered by retail companies
- 2. Discuss benefits of loyalty schemes
- 3. Identify information sources for loyalty schemes
- 4. Identify specific offers that can be availed by loyalty scheme members
- 5. Understand buying signals of customers
- 6. Illustrate the format of a membership form
- 7. Discover how to prepare customers to join loyalty programmes
- 8. Describe the concept of proof of membership
- 9. Justify the need to avoid errors in customer information

#### Notes for Facilitation



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

#### **UNIT 7.1: Understanding Loyalty Schemes**

#### **Unit Objectives**



#### At the end of this unit, students will be able to:

- 1. Explain loyalty scheme
- 2. List various characteristics and benefits of loyalty schemes
- 3. Identify various information sources of loyalty schemes
- Express the importance of sources like company websites and advertisements in promoting loyalty schemes

#### 7.1.1. What is a Loyalty Scheme?





Ask the students if they have ever been part of any loyalty scheme. If yes, ask to explain what such schemes offer.



Note the key points of the responses on a flipchart and introduce what loyalty scheme programmes



- Loyalty scheme programmes are regulated marketing campaigns by organisations to promote brand loyalty.
- Under these schemes, members are provided with a special loyalty card, also known as advantage card, club card, reward card, or point card.

#### 7.1.2. Characteristics and Benefits of Loyalty Schemes





Ask the students what benefits they get from loyalty schemes.

#### **Explain**



#### **Explain the following benefits:**

- Instant or special discount on select products, as well as redemption points
- Complimentary parking facilities and coupons
- Free shipping or home delivery
- A relaxed return policy (90 days) or exclusive sale preview to customers

Explain how such schemes benefit in attracting and retaining customers.

Provide the following tips on four fundamental features should be a part of any successful loyalty programme:

- Should be influential along with the ability to track profits and bring about positive behavioural changes
- Should be able to differentiate and target members on a segmented basis
- Should have the ability of recognising and rewarding transactional and non-transactional behaviour
- Should offer achievable and relevant rewards which should be a blend of aspirational and practical options

#### 7.1.3. Acquiring Information about Loyalty Schemes





Ask the students what they think are the sources of information of such loyalty schemes for customers.

#### **Elaborate**



Elaborate on students responses and mention the following sources:

- Sales personnel and cashiers
- Company website
- Advertisements
- SMS alerts
- E-mail marketing
- Word of mouth



#### Provide the following tip:

To ensure the maximum responses from customers and minimum opt-out rates, the information or messages must be sent to customers in the way they like to receive.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.



- Summarise loyalty schemes.
- Summarise various characteristics and benefits of loyalty schemes.
- Summarise various information sources of loyalty schemes.
- Summarise the importance of sources like company websites and advertisements in promoting loyalty schemes.

– Notes 🗐 —————	

#### **UNIT 7.2: Loyalty Scheme Offers Specific to Members**

#### - Unit Objectives 🍱



#### At the end of this unit, students will be able to:

- Justify the need to offer special schemes to valued customers
- 2. Identify ways to appreciate loyal customers
- 3. Recognise ways to develop customers' interest in loyalty programmes
- Identify financial benefits of loyalty schemes to members 4.

#### 7.2.1. Special Schemes for Valued Customers





Ask the students if they have been offered any special scheme by a retail store.



- These offers include cash back, buy one get many, heavy discounts on merchandise, free home delivery, complementary meals in select food outlets and gift vouchers from select retailers.
- Many a times, loyal customers are provided with cards which are supposed to get stamped on every purchase made by customers.
- Giving away gift vouchers for a day at a spa or a day at some race proves a form of personal touch.
- Customers who only purchase discounted lines are termed as 'cherry pickers'; these customers cost as much as those who spend less.
- When rewards from well-designed loyalty programmes are provided to the better customers segment, it provides a reason to stay on for the less-desirable customers too.

#### **Example**



It has been observed by ABC Supermarket that the actual profit generating customers are only around 30% and this helps to cover the cost of less profitable customers. If you go through Pareto Principle Chart you will find that the 80% of profits are generated by the top 20% of customers, whereas the bottom 30% of customers eat up 50% of the profits produced by others. It is advisable for supermarkets that loyalty programmes must be introduced in two segments; one should especially focus on more profitable customers and the other should be made for the customers who generate less profits.

#### Provide the following tips on small gestures that can please a loyal customer:

- Be friendly and polite to the customer
- Give a complementary drink, like tea or coffee, if you can

- Offer additional discounts if possible
- Take feedback from the customer about the quality of service, staff behaviour, store cleanliness, hygiene, etc.
- Always focus on building positive relationship
- Provide special treatment to specific groups like children, elderly or senior citizens.

#### 7.2.2. Developing Customer Interest





Ask the students what will develop customer interest in these programmes.

#### **Explain**



#### **Explain the following points:**

- Print ormedia advertisements, SMS alerts, and e-mail marketing campaigns are certain tools that organisations should use extensively to inform customers about the loyalty schemes and their benefits.
- There is no need to revise prices for attracting 'cherry pickers' when best customers are happy enough in buying products at offered prices.

#### 7.2.3. Encouraging Customers to Join





If you want customers to join your loyalty programme, you need to think about two main things:

- The incentive (create desire to join) and
- The programme information (why they should join)

#### **Tips**



Provide the following tips on three main aims of a good loyalty programme:

- Attract
- Maintain
- Retain

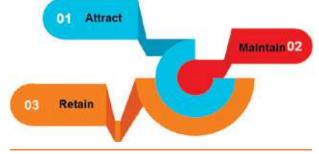


Fig 7.1 Three Main Aims of a Good Loyalty Programme

#### 7.2.4. Financial Benefits of Loyalty Schemes to Members

#### Role Play

- Ask three students to come forward for a role play on answering a customer's query related to financial benefits.
- Ask one of the students to play the role of an associate trainee employed at a leading, multibrand apparel store.
- Ask the other two student to play the role of a customer.
- Tell that the associate trainee needs to let the customer know benefits of loyalty schemes.
- Provide feedback at the end of the role play on what could have been better.
- If the time allows, conduct the same role play with another pair of students.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.



- Summarise the need to offer special schemes to valued customers.
- Summarise ways to appreciate loyal customers.
- Summarise ways to develop customers' interest in loyalty programmes.
- Summarise financial benefits of loyalty schemes to members.

Notes 🗐			

# UNIT 7.3: Responding to Customer Queries and Concerns about the Loyalty Scheme

#### - Unit Objectives



At the end of this unit, students will be able to:

- 1. Recognise the importance of probing customers for information
- 2. Review the role of a cashier in gathering customer information
- 3. Identify how to handle customer queries in a friendly manner
- 4. Identify buying signals in customers

#### 7.3.1. Probing Customers for Information

#### **Explain**



#### **Explain the four main categories of questions:**

- Open questions
- Closed questions
- Clarifying questions
- Confirming questions

#### **Role Play**



- Ask two students to come forward for a role play on probing customers for informationabout buying a membership card before generating invoice.
- Ask one of the students to play the role of a cashier at a leading apparel and home décor store.
- Ask the other student to play the role of a customer.
- Provide feedback at the end of the role play on what could have been better.
- Conduct the same role play with another pair of students.

#### **Tips**



#### Provide the following tips on probing customers:

- How the buying decision is made
- Present loyalties plus perceived outcomes
- Requirements and expectations which are not met

#### 7.3.2. Handling Customer Queries



How the executive deals with customers during such conversations is critical, since a patient and polite reply by the staff can improve chances of the customer buying loyalty membership.

#### **Notes for Facilitation**



If required, initiate a discussion on this topic.

#### Field Visit



- Conduct a field visit to a retail store.
- Ask students to ask staff members about their loyalty schemes.
- Ask them to observe staff behaviour and identify if they're able to handle repetitive or similar queries patiently and politely.
- Assist them, whenever required, and resolve their queries.
- Ask them to share their observations.

# Tips 🚇

#### Provide the following tips for handling customers:

- Try to listen to your customers carefully and let them finish first.
- Ask problems in a concerned and caring way.
- Try to put yourself in your customers' shoes.
- In case you are busy, try to find another person who can address to the gueries of the customers.

#### 7.3.3. Observing Customers Keenly to Identify Buying **Signals**



Executives should be alert and build positive rapport with customers.

#### **Example**



Avinash works as an associate trainee at a leading retail store and handles the task of bringing in new customers into the loyalty programme. While assisting customers during purchases, he engages them in polite conversations to identify positive buying signals. He informs the interested customers about the loyalty schemes and answer all their queries smilingly and patiently. He persuades interested customers to fill up the membership form, following which they can start receiving benefits of the scheme.

#### **Tips**



Provide the following tips on methods that can be adopted to identify signals that customers exhibit to indicate their interest in loyalty programmes:

- Direct observation
- Indirect observation

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.



- Summarise the importance of probing customers for information.
- Summarise the role of a cashier in gathering customer information.
- Summarise how to handle customer queries in a friendly manner.
- Summarise buying signals in customers.

Notes			

#### **UNIT 7.4: Preparing Customers to Register for a Loyalty Scheme**

#### **Unit Objectives**



#### At the end of this unit, students will be able to:

- 1. Recognise need to promptly register potential customers for loyalty schemes
- 2. List reward structures for customers
- 3. Illustrate the format of a loyalty scheme application form
- 4. Identify ways to convince customers in filling application form

#### 7.4.1. Being Prompt with Potential Customers

#### Say



As soon as staff members spot positive buying signals among a customer, they must encourage the customer to sign up for loyalty scheme membership immediately. Delay can cause the customer to change his/her mind, resulting in loss of potential sales for the retail store.

#### **Role Play**



- Ask two students to come forward for a role play on being prompt with potential customers.
- Ask one of the students to play the role of a trainee associate who works in a retail store and
  assists customers in making purchase decisions. He/she also introduces prospective members
  to ongoing loyalty schemes in the store.
- Ask the other student to play the role of a customer.
- Provide feedback at the end of the role play on what could have been better.
- Conduct the same role play with another pair of students.

#### Tips Q

#### Provide the following tips on the following reward structures:

- Purchase 9, get 1 free
- Clubs
- Discounts
- Contests
- Prizes for paying up front

#### 7.4.2. Loyalty Scheme Application Form

#### **Resources to be Used**



A sample application form for loyalty card membership

#### **Practical**



- Show a sample application form for loyalty card membership.
- Explain its features and components.
- Explain that such forms need to be filled by customers to avail the benefits of the scheme.

#### 7.4.3. Convincing Customers to Fill Application Form

#### Say



- Nowadays, organisations provide online facility to fill up membership forms.
- Sometimes, executives may come across customers who are interested in the loyalty programme, but are not immediately willing to register for membership. In such situations, executives should try and understand their reasons for the same instead of forcing the customers to sign up for the scheme.

#### **Role Play**



- Ask two students to come forward for a role play on convincing customer fill the application form.
- Ask one of the students to play the role of a store executive who is facilitating a customer in filling the loyalty programme application form.
- Ask the other student to play the role of a customer.
- Provide feedback at the end of the role play on what could have been better.

#### Tips



#### Provide the following tips asking customers to fill application form:

- The form should be simple and easy for customers to understand and fill
- Store executive must be patient and helpful while assisting the customer
- If necessary, fill the details for the customers yourself

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.



- Summarise the need to promptly register potential customers for loyalty schemes.
- Summarise reward structures for customers.
- Summarise the format of a loyalty scheme application form.
- Summarise ways to convince customers in filling application form.

Notes ===

#### **UNIT 7.5: Proof of Membership**

#### - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Interpret how the loyalty kit acts as a proof of membership for customers
- 2. Explain how to crosscheck details with customers
- 3. List reasons to offer loyalty cards

# 7.5.1. What is a Loyalty Kit and a Proof of Membership for Customers?

#### **Explain**



#### **Explain that:**

- Once customers sign up for loyalty scheme membership, they receive an acknowledgement for the same as a proof of membership. This could be in the form of an SMS notification or e-mail.
- Customers also receive the loyalty card kit, which includes the card itself, discount coupons, a
  user guide complete with terms and conditions, and sometimes complementary gifts, such as
  music CDs.

#### Resources to be Used



A sample acknowledgement email or SMS

#### **Practical**



- Show a sample acknowledgement emails or SMS.
- Explain its features and components.

#### **Field Visit**



- Conduct a field visit to a retail store.
- Ask students to enquire with the manager about how they complete formalities related to signing up their customers for loyalty membership, including handing over proof of membership at the end of the transaction.
- Assist them, whenever required, and resolve their queries.
- Ask them to share their observations.

#### 7.5.2. Crosschecking Details with Customers

#### **Explain**

#### **Explainthe following points:**

- Store executives must always crosscheck details filled by customers in the membership form to avoid any discrepancy or error.
- However, in case of a mistake, the error must be rectified as early as possible.

#### **Team Activity**



- Conduct a skill practice team activity.
- Divide the students in teams of 2 students each.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Ask them to assist their friend or classmate in filling a sample membership form.
- Ask the students to crosscheck all details to avoid filling incorrect information.

Skill Practice	Time	Resources	
Crosschecking details with	30 mins	Pencil and sample membership	
customers	30 1111115	form	

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.
- Ask students to complete the exercise given in their guides.
- Assist them in completing the exercise, if required.

#### **Summarise**



- Summarise how the loyalty kit acts as a proof of membership for customers.
- Summarise how to crosscheck details with customers.
- Summarise reasons to offer loyalty cards.

#### Notes



Notes 🗒 ———————————————————————————————————	











## 8. Store Security

- Unit 8.1 Importance of Workplace Security
- Unit 8.2 Various Types of Security Risks
- Unit 8.3 Identifying and Preventing Security Risks
- Unit 8.4 Noticing and Reporting Security Risks
- Unit 8.5 Barriers in Identifying Security Risks
- Unit 8.6 Reporting of Security Risks
- Unit 8.7 Reasons Why Only Authorised Personnel should Take Responsibility of Security Risks
- Unit 8.8 Key Security Solutions



## Key Learning Outcomes 💆

#### At the end of this module, students will be able to:

- 1. Describe the significance of workplace security
- 2. Identify various security risks
- 3. Discuss methods to notice and report security risks
- 4. List barriers of dealing with security risks and ways to overcome them
- 5. Discuss how to report security risks efficiently
- 6. Describe reasons of security risks
- 7. Illustrate different ways of preventing security risks
- 8. Discuss the control of keys, numbering and labelling, electronic tags, good lighting, web or CCTV etc.
- 9. Define shoplifting, robbery, employee theft and aggressive customers

### **Notes for Facilitation**



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

## **UNIT 8.1: Importance of Workplace Security**

## **Unit Objectives**

## s 🥝

#### At the end of this unit, students will be able to:

- 1. Explain the concept of workplace security
- 2. Discuss the importance of workplace security
- 3. List some common security measures taken by retailers
- 4. Identify some good practices to maintain security

## 8.1.1. Introduction to Workplace Security

## Say



- The prime objective of every retailer is to earn profit, and the main source of generating profit is selling of products and services.
- The products can be promoted through advertisements, personal selling, discounts, schemes, special offers, etc.

## 8.1.2. Key Importance of Workplace Security

## **Explain**



Explain the measures commonly taken by retail stores to ensure and maintain security in their premises:

- Deployment of security personnel
- Secured doors
- Secured windows
- CCTV
- Locks for select display units
- Appropriate lighting arrangements
- Lockable bins
- Lockable showcase
- Electronic tags (RFID technology)
- Numbering and labelling of merchandise
- Arranging merchandise in easily accessible manner
- Marking theft-prone merchandise

## Tips 🗓

### Provide the following tips good practices that can help retailers maintain security:

- Ensure adequate number of staff to manage store operations efficiently
- Install a security system for surveillance even after the store is closed
- Ensure adequate lighting for CCTV capturing
- Deal with emergencies, like robberies, theft and fire.
- Do not stock huge sum of money in the store. Deposit cash regularly to avoid losses in case of theft

## Notes for Facilitation



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## Field Visit



- Conduct a field visit to a nearby retail store.
- Divide students into teams of 3-4 students.
- Ask students to select a store per team and analyse the workplace security measures in place such as lockable bins, CCTV cameras, secured doors, security personnel, etc.
- Ask them to analyse the importance of each measure.
- Ask them to note their observations as a team and prepare a report.
- · Assist them, whenever required, and resolve their queries

## **Summarise**



- Summarise the concept of workplace security.
- Summarise the importance of workplace security.
- Summarise some common security measures taken by retailers.
- Summarise some good practices to maintain security.

### **Notes**



## **UNIT 8.2: Various Types of Security Risks**

## -Unit Objectives 🏻

### At the end of this unit, students will be able to:

- 1. Explain different types of security risks
- 2. Distinguish between security risks, like shoplifting, burglary and by employees theft
- 3. Recognise aggressive customers as a potential security risk
- 4. List ways to deal with aggressive customers

## 8.2.1. Types of Security Risks





Ask students about the security risks they think a retail store can encounter and then explain the following ones:

- Shoplifting
- Employee theft and burglary

## **Elaborate**



#### Elaborate further that in case of such issues, the store staff should follow the following instructions:

- Activate the alarm system.
- Call the police as soon as possible.
- Help customers escape from the store premises.
- Avoid touching or disturbing the area of crime.
- If possible, record details about the attackers.
- Identify items that have been robbed.
- In case of riots or violent activities, lock down the store and try to escape from a back door.

## **Team Activity**



- Conduct a skill practice team activity.
- Divide the students in teams of 3-4 students.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Ask them to search online and come up with at least two security incidents that have happened in retail stores.
- Ask the students to discuss in their teams and decide how these incidents could have been avoided
- Ask the students to prepare a report based on their observations.
- Tell them to choose a representative from their team and share their reports.
- Initiate a discussion, as required.

Skill Practice	Time	Resources
Analysing Security Risks	30 mins	Computer, Internet, Pencil and Paper

## 8.2.2. Aggressive Customer

## **Notes for Facilitation**



Focus on that the major security risk for retail stores are customers who get aggressive and resort to verbal or physical violence.

## Tips



#### Provide the following tips on handling aggressive customers:

- Stay calm and maintain a soothing voice
- Control your own voice and body language
- Listen and try to understand to the customer's point of view
- Call the security staff, if necessary

### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## **Role Play**



- Ask two students to come forward for a role play of handling aggressive customers.
- Ask one student to play the role of a customer who is getting aggressive in the store as he/she had to wait in the queue for long.
- Ask the other student to play the role of the trainee associate who is trying to handle the situation.
- Provide feedback at the end of the role play.
- Repeat this role play with 2-3 more pair of students.



- Summarise different types of security risks.
- Summarise between security risks, like shoplifting, burglary and by employees theft.
- Summarise aggressive customers as a potential security risk.
- Summarise ways to deal with aggressive customers.

## **UNIT 8.3: Identifying and Preventing Security Risks**

## -Unit Objectives



### At the end of this unit, students will be able to:

- 1. Identify and prevent security risks
- List some security measures like implementing good store design and enforcing employee training
- 3. Discuss ways to reduce employee theft
- 4. Outline security policies and control mechanisms

## 8.3.1. Identifying and Preventing Security Risks





Security risks can be identified and prevented by taking due precautions in various areas in a store.

# Store Design

- Store entrances, dressing rooms and delivery areas are specifically prone to security issues.
- Clear view of the entrance and exits can allow store employees to keep a watchful eye on doubtful customers.

# Employee Training

- Never assume that well-dressed customers cannot shoplift.
- Always be alert towards large groups of visitors.
- Spot loose clothing on customers.
- Remember that shoplifters are constantly eyeing the sales staff to avoid getting caught.
- Look for unusual signs such as a customer loitering around the same area for too long.

## 8.3.2. Reducing Employee Theft





A positive and supportive work environment can improve employee satisfaction and encourage them not to steal from the store.

## 8.3.3. Establishing Security Policies and Control **Mechanisms**



Store theft and other risks can also be handled by adopting suitable security policies and control mechanisms such as:

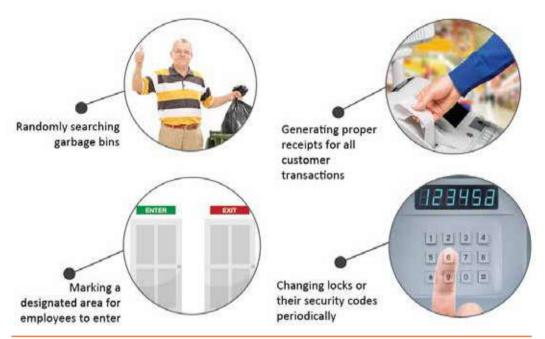


Fig. 8.1 Security Policies and Control Mechanisms

## Tips

#### Provide the following tips on improving store security:

- Adopt a clean store design to remove any blind spots
- Clear the shelves to remove clutter, as a cluttered display is an easy target for thieves
- Place security cameras near merchandise, this can discourage a potential shoplifter
- Be alert and encourage your co-workers to do the same

### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## Field Visit



- Conduct a field visit to a nearby retail store.
- Divide students into teams of 3-4 students.

- Ask students to select a store per team and analyse the security drawbacks and risks present in the store that can encourage incidents like theft and shoplifting.
- Ask them to prepare a report on how these drawbacks and risks can be eliminated.
- Ask them to note their observations as a team.
- Assist them, whenever required, and resolve their queries.



- Summarise how to prevent security risks.
- Summarise some security measures like implementing good store design and enforcing employee training.
- Summarise ways to reduce employee theft.
- Summarise security policies and control mechanisms.

Notes 🗒			

## **UNIT 8.4: Noticing and Reporting Security Risks**

## **Unit Objectives**



### At the end of this unit, students will be able to:

- 1. Identify and report security risks
- 2. Recognise that compliance ensures security and reduces risk
- 3. Recognise need to adopt multi-layered approach to security
- 4. Explain ways to remain alert on the job

## 8.4.1. Reporting Security Risks

## Ask



Ask students to describe what, according to them, can be the possible appearance and behavioural characteristics of a shoplifter.

## Do



Focus on that employees must closely observe the dressing up and behaviour of people in the store to distinguish between potential customers and possible shoplifters.

## 8.4.2. Compliance Ensures Security and Reduces Risk

## Say



Every store trains and educates its employees against shoplifting and theft. However, this training may prove worthless if employees do not comply with security policies and procedures set up by the company.

## 8.4.3. Adopting a Multi-layered Approach to Security

## Say



- Locking stockrooms and limiting staff and customer access during stock taking, ensures a more secure retail environment.
- Once these kinds of basic practices are put into place, electronic systems act as the final layer of security, both within and outside the store.

## Tips



### Provide the following tips on remaining alert on the job:

- Watch for common warning signs like nervousness or restlessness of customers
- Eliminate hiding places. Strategically placed mirrors can open up sight lines into hidden areas and keep shoppers honest
- Be aware of anyone snuggling behind you when you are busy sorting or organising merchandise
- Although you cannot control every incidence of shoplifting, you should not lower your guard

### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## Resources to be Used



Computer and Internet

## **Activity**



- Ask the students to search online and come up with some unique security measures that retail stores deploy nowadays.
- Ask them to analyse them and write down their characteristics on how they help achieve high security.
- After 10 minutes, ask 5-6 students randomly to share their lists.
- Initiate a discussion, as and when needed.
- Ask the rest of the class if they have any different observations.

Skill Practice	Time	Resources
Analysing security measures in stores	30 Mins	Computer, Internet, Pencil and Paper

## **Summarise**



- Summarise how to report security risks.
- Summarise how compliance ensures security and reduces risk.
- Summarise the need to adopt multi-layered approach to security.
- Summarise ways to remain alert on the job.

## Notes



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## **UNIT 8.5: Barriers in Identifying Security Risks**

## -Unit Objectives



#### At the end of this unit, students will be able to:

- Locate the barriers in identifying security risks
- 2. List barriers like less attentive store staff and heavy footfall
- 3. Describe cyber risk in retail
- 4. Identify solutions for overcoming barriers

## 8.5.1. Barriers in Identifying Security Risks





#### **Explain the following barriers:**

- Inattentive store staff
- Employee involvement in theft
- Huge traffic of customers

## 8.5.2. Cyber Risk in Retail





#### Explain the following unique risks for retail clients:

- Risk of losing potentially large amounts of consumer and employee data, including credit card data, customer details, etc.
- Security failures of stored credit cards and point-of-sale machines.
- Loss of privacy and security questions related to loyalty programme information.

## 8.5.3. Solutions for Overcoming Barriers



### Provide the following tips on adopting some simple measures:

- Ensure that the merchandise is properly visible.
- Avoid placing items too close to entrance or exit gates.
- Ensure that all areas of the store are sufficiently lit.
- Security guards should be deployed at appropriate locations across the store.
- Install CCTV cameras at different areas to cover all display items.
- Build employee credibility and loyalty.

- Install security tools such as electronic article surveillance systems, ink tags and two-way radio sets.
- Consider all security risks while selecting a store location.

## 8.5.4. Steps of Reducing Barriers

## **Steps: Reducing Barriers**





STEP 1: Ensuring Visibility of Merchandise



STEP 2: Avoiding Placement of Merchandise too Close to Store Entrance and Exit



STEP 3: Ensuring all Store Areas are Properly



STEP 4: Deploying Security Personnel at Appropriate Places



STEP 5: Placing CCTV Cameras at appropriate locations



STEP 6: Installing Electronic Article
Surveillance Systems, Ink Tags and
Two-Way Radio Sets

## Tips 🚇

Provide the following tips on good steps that can be taken to overcome of young people roaming around in stores that pose a serious security and safety risk:

- Good lighting, both inside and outside the store (such as car parking, loading docks, etc.)
- Security guards who are impartial and capable of handling any situation
- Conducting activities and events that engage youth

### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## **Team Activity**



- Conduct a skill practice team activity.
- Divide the students in teams of 3-4 students.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- Ask them to search online about a recent security incident in retail stores.
- Ask the students to note down possible causes and identify what could have prevented that incident.
- Ask the students to prepare a report based on their observations.
- Tell them to choose a representative from their team and share their reports.
- Initiate a discussion, as required.

Skill Practice	Time	Resources
Implementing Steps to Reduce Barriers	30 mins	Computer, Internet, Pencil and Paper

## Summarise 2



- Summarise the barriers in identifying security risks.
- Summarise barriers like less attentive store staff and heavy footfall.
- Summarise cyber risk in retail.
- Summarise solutions for overcoming barriers.

## - Notes



## **UNIT 8.6: Reporting of Security Risks**

## -Unit Objectives 🏻

### At the end of this unit, students will be able to:

- 1. Explain reporting of security risks in store
- 2. Recognise need of a separate security department
- 3. Identify persons responsible for handling security risks
- 4. List duties of security personnel

## 8.6.1. Barriers in Identifying Security Risks





### Security risks for a retail store may be in terms of loss of:

- Merchandise
- Money
- Store property

## 8.6.2. Responsibility of Security Department





#### **Explain the following points:**

- Security personnel must keep a watchful eye on customers, other staff members and stocks to ensure safety at all times.
- Security guards need to be vigilant and alert to prevent any unwanted activities in the store.
- In case theft takes place, it must be reported immediately to the head of security or security in-charge and to higher authority such as the store head.
- Local police should also be informed at the earliest.

## Tips



### Provide the following tips on duties performed by security staff in a retail store:

- Protect people and property of the store
- Ensure checks to allow only authorised staff members to enter the store
- Deter criminals by being present at the premises
- Observe and act against untoward incidents
- Handle calls for help during dangerous situations like robbery, burglary, etc.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise reporting of security risks in store.
- Summarise need of a separate security department.
- Summarise persons responsible for handling security risks.
- Summarise duties of security personnel.

Notes 🗐			

# UNIT 8.7: Reasons Why Only Authorised Personnel should Take Responsibility of Security Risks

## - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Identify people responsible for handling security risks
- 2. Explain why only authorised personnel should take responsibility of security
- 3. Value the security of others in retail store
- 4. Identify ways to stay safe at work

## 8.7.1. Who Takes Responsibility of Handling Security Risks?

## Say



- Employees in a retail store are expected to be vigilant. However, they are not recommended to take responsibility of security risks without authorisation.
- Security personnel are given special training to deal with such incidents in a safe and professional manner.

# 8.7.2. Reasons Why Only Authorised Personnel should take Responsibility of Security Risks

## **Explain**



### Explain the reasons for not taking security risks without authorisation:

- To safeguard the security of others in the store.
- For legal consideration as, responsibility can only be taken by an authorised person.
- Company policies do not allow employees to take responsibility without authorisation from the company.

## Tips



#### Provide the following tips:

- Take a moment to look around before exiting your car, entering a building, or walking out into a parking lot.
- Look for any suspicious people or out-of-place things before you leave a location that is secure.

### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.

Optionally, ask any other student to explain the concept in doubt.



- Summarise people responsible for handling security risks.
- Summarise why only authorised personnel should take responsibility of security.
- Summarise the security of others in retail store.
- Summarise ways to stay safe at work.

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## **UNIT 8.8: Key Security Solutions**

## - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Explain use of tags as security solutions
- 2. Describe importance of having a store opening team
- 3. Identify measures taken before closing the store

## 8.8.1. Use of Tags as Security Solutions





Attaching soft and hard tags on merchandise prevents shoplifting. These tags must be removed by cashiers during billing.

## 8.8.2. Importance of Having a Store Opening Team

## **Explain**



#### **Explain the following points:**

- The team comprises Head Cashier/Assistant Head Cashier, Electronic Data Processing (EDP) Manager/Assistant EDP, Security in-charge/Assistant Security in-charge.
- The store opening team is responsible for examining the entire store and checking security measures.

## 8.8.3. Measures Taken before Closing the Store

## **Explain**



#### Explain the measures taken before closing the store:

- The security in-charge should patrol the entire store to ensure no customer or staff member gets left behind in the washroom or trial rooms.
- He/she should also check if cupboards, display cases and theft-prone items are locked properly.
   Before exiting the store, the security in-charge must turn off security sensors, lights, and CCTV cameras.
- The burglar alarm should be activated before shutting the store.

## Tips



#### Provide the following tips:

Most of security alarm systems have specifically placed sensors that can get triggered when

somebody is close enough.

• If an alarm goes off, the security personnel working at night can quickly check the store premises to see if there has been a potential break-in.

### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.
- Ask students to complete the exercise given in their guides.
- Assist them in completing the exercise, if required.

## Field Visit



- Conduct a field visit to a nearby retail store, preferably when the stores are getting closed.
- Divide students into teams of 3-4 students each and assign each team a store to study.
- Ask students to examine the steps employees follow before closing the store.
- Ask them to note their observations as a team and prepare a report.
- Assist them, whenever required, and resolve their queries.



- Summarise use of tags as security solutions.
- Summarise importance of having a store opening team.
- Summarise measures taken before closing the store.

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## 9. Health and Safety at Workplace

Unit 9.1 - Health, Safety and Security Plans and Procedures

Unit 9.2 - Reporting Health and Safety Concerns

Unit 9.3 - Company Policies towards Health and Safety

Unit 9.4 - First Aid and Emergency Medical Plan

Unit 9.5 - Following Up the Emergency and Evacuation Plan

Unit 9.6 - Making Better Work Environment



## Key Learning Outcomes 💆

### At the end of this module, students will be able to:

- Explain how to report health and safety issues 1.
- 2. Explain how to identify health, safety, and security breaches
- 3. Describe ways of rectifying health, safety and security breaches
- Discuss the concept of emergency medical plan and first aid 4.
- 5. Outline how to carry out emergency or evacuation plans
- 6. Explain role of employees in maintaining safe working environment

## Notes for Facilitation



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

## **UNIT 9.1: Health, Safety and Security Plans and Procedures**

## **Unit Objectives**



#### At the end of this unit, students will be able to:

- 1. Recognise legal obligation of employers to keep workers safe
- 2. Explain how to lift and handle goods safely
- 3. Discuss planning for safe and efficient lifting of goods
- 4. Ensure suitable safety measures before lifting goods
- 5. Identify the threats to the workers and workplace
- 6. Recognise the disadvantages of not following health and safety measures in a retail store

## 9.1.1. Legal Obligation to Keep Workers Safe

## Say



- Occupational Health and Safety (OHS) legislation has existed in India since several decades.
   Several acts and legislations are in place to ensure workers' safety, including elimination of potential risks to promote health, safety and well-being of employees at workplace.
- Failure to deploy satisfactory health and safety systems can attract huge penalties including, imprisonment for the employers.
- According to the law, retail stores must comply with government regulations related to workers'
  health and safety as well as environmental issues. Retail stores must retain all documentation
  and records to support their compliance with the laws.

## 9.1.2. Lifting and Handling Goods Safely





#### **Explain the following points:**

- While moving goods manually or mechanically employees should be aware of the work area and various potential hazards surrounding them, so that they can remain alert and remain safe while performing these tasks.
- When using lifting and handling equipment, all company guidelines and manufacturer instructions should be followed strictly.

## 9.1.3. Plan Safe and Efficient Lifting of Goods

### Do



#### Mention that an employer must consider the following questions:

- What is the path to be followed after lifting goods?
- Is the use of handling aids required?
- Is there sufficient space to allow lifting movement?
- Is it possible to slide or push the load instead of lifting it?
- Would a team be required to complete the lifting process?

## 9.1.4. Take Suitable Safety Measures before Lifting

## Explain



#### **Explain the following guidelines:**

- Conduct proper assessment of weight, size and shape of the load as well as overall distance that has to be covered.
- Ensure there is adequate space for unrestricted movement and proper footing.
- Use hand carts or pallet jacks for loads that appear to be too heavy or awkwardly placed.
- In addition, proper balance and posture must be maintained while lifting heavy goods.

### Explain the points that should be considered during the lifting process:

- Bend the knees and keep the back straight.
- Grip the load firmly using the palms of your hands.
- Do not attempt to lift the load in one go. First, use body weight to shift the load and then lift it by pushing it up with your legs.
- Keep elbows and arms close to the body while lifting.
- Keep the load close to body while lifting and moving.
- Avoid twisting your body while carrying the load. If you need to change direction, first adjust foot position accordingly and then turn the whole body around.
- Bend knees while lowering the load.
- While depositing the load on a shelf or bench, place it at the edge and push it backwards.
- Avoid wearing tight clothing or uncomfortable footwear while handling heavy loads.

## 9.1.5. Use Approved Lifting and Handling Techniques

## **Resources to be Used**



A heavy box

## **Activity**

- *G*
- 1. Ask the students to volunteer to lift a heavy box.
- 2. Ask them to follow the recommended steps.
- 3. Ask other students to watch and learn.
- 4. For each student lifting the box, ask other students to share what went missing and could have been better.
- 5. Provide feedback, as and when required.

Skill Practice	Time	Resources
Use of approved lifting and handling techniques	30 Mins	Heavy Box

## **Practical**



- Show how to lift and handle the heavy box.
- Explain the steps.
- If required, ask one or two students to try the same.

# 9.1.6. Common Company Guidelines for Lifting and Handling Equipment

## Say



### Some of the important guidelines to be followed by employers include the following:

- As far as possible, use mechanical equipment to avoid manual handling of loads, particularly heavy goods and equipment.
- Know all do's and don'ts to reduce the risk involved in manual handling of loads.
- Follow instructions and information on how to handle heavy loads.
- Understand instruction manuals of the equipment to understand its safe handling.

## 9.1.7. Threat to Workers and Workplace

## **Explain**



#### **Explain the following risks:**

Fire risks

Accident risks

Stress

Fig. 9.1 Health and Safety Risks at Workplace

## 9.1.8. Risks of Not Following Health and Safety Plan in a **Retail Store**



- Focus on adhering to a proper safety and health plan.
- Provide an example of fire as a potential hazard.

## **Tips**

### Provide the following tips on important safety guidelines for retail employers and organisations:

- Complete health and safety of all the employees must be ensured
- There should be awareness of work-related risks faced by employees
- All preventive measures should be adequately planned, monitored and reviewed from time to time
- Employees should have relevant information and adequate training pertaining to workplace risks and various preventive measures to minimise these risks
- Organisations must maintain complete documentation of all health, safety, security and environmental records as per company and regulatory standards

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise legal obligation of employers to keep workers safe.
- Summarise how to lift and handle goods safely.
- Summarise planning for safe and efficient lifting of goods.
- Summarise suitable safety measures before lifting goods.
- Summarise the threats to the workers and workplace.
- Summarise the disadvantages of not following health and safety measures in a retail store.

- Notes			

## **UNIT 9.2: Reporting Health and Safety Concerns**

## -Unit Objectives 🤎

#### At the end of this unit, students will be able to:

- Explain importance of reporting health and safety measures 1.
- 2. Identify different sources of workplace hazards
- 3. Discuss how to handle hazardous substances safely on your own
- 4. Recognise need to promptly report health and safety concerns

## 9.2.1. Reporting is Necessary for Health and Safety



- "Prevention is better than cure."
- Employees have the responsibility of reporting safety or health breaches to the concerned person at the earliest.

## 9.2.2. Understanding Hazards

## **Explain**



Explain that the hazards in workplace can seriously endanger the life of people working there.

#### **Explain the following hazards:**









**Batteries** 

**Paint** 

Fluorescent Lights







**Used Oil** 

Medicines

Electronics

Fig. 9.2 Different Sources of Workplace Hazards

## 9.2.3. Handling Hazardous Substances Safely on Your Own



- A well-informed employee can handle various hazards at a workplace by using protective gear/ equipment, such as protective clothing, eyewear, headgear, footwear and gloves provided by the employer.
- Ensure that you are well-trained and fully prepared to deal with occupational hazards in the workplace.
- Avoid dealing with hazards that you cannot handle. Instead, seek assistance from professionals to handle such hazards.

## 9.2.4. Reporting Health and Safety Concerns to Concerned Person



All accidents must be brought to the employer's attention immediately.

### Provide the following tips on the following measures:

- Immediately report to relevant person or authority
- Warn other employees that may get affected
- Ask others to keep away from the hazard as much as possible

### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Ask two students to come forward for a role play on reporting health and safety concerns to the concerned person.
- Ask one student to play the role of an employee who has encountered a hazardous material in the store and needs to report the same.
- Ask the other student to play the role of the concerned person who needs to be reported.
- When reported, ask the concerned to take recommended actions.
- Provide feedback at the end of the role play.
- Repeat this role play with 2-3 more pair of students.



- Summarise the importance of reporting health and safety measures.
- Summarise different sources of workplace hazards.
- Summarise how to handle hazardous substances safely on your own.
- Summarise the need to promptly report health and safety concerns.

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## **UNIT 9.3: Company Policies towards Health and Safety**

## - Unit Objectives



### At the end of this unit, students will be able to:

- 1. Indicate possible health and safety threats at workplace
- 2. Explain the parameters to check safety, security and health breaches
- 3. Recognise the importance of following company's safety policies
- 4. Identify safety gears for retail workers

# 9.3.1. Understanding Possible Health and Safety Threats at Workplace

## Say



#### Some of the many health and safety threats present at workplaces include the following:

- Repetitive exertions
- Posture stresses
- Extreme noise
- Voice problems, especially for telemarketers
- Improper electrical wiring
- Dysfunctional safety tools, such as surveillance camera or biometric system

# 9.3.2. Parameters to Check Safety, Security and Health Breaches

## Example



### Some examples of safety, security and health breaches include the following:

- Working at extreme heights which involves high risk of falling down
- Allowing unlicensed or untrained persons to operate certain equipment
- Failing to ensure that the retail store is appropriately guarded
- Failing to notify concerned authority in case of serious injury or illness at the workplace

### **Field Visit**



- Conduct a field visit to a nearby shopping mall.
- Divide the students into teams of 3-4 students each and assign each team a store to study.
- Ask students to examine any safety, security and health breaches present in the store.
- Ask them to note their observations as a team and prepare a report.
- Assist them, whenever required, and resolve their queries.

## 9.3.3. Following Company's Safety Policies

## **Explain**



Explain that employees can stay safe at their workplace by simply following safety policies of the retail store.

# 9.3.4. Reporting Health and Safety Concerns to Concerned Person

## Say



- Safety gears are tools used for preventing risks and injuries at the workplace or in real-life situations.
- Employees deployed at production floor, large distribution centres or other hazardous work areas are required to wear protective gears while performing tasks.

## **Tips**



### Provide the following tips on the following measures:

- With changing environment, company policies should also be updated regularly.
- Guidelines specified in these policies should be read and understood properly so that employees can comply with the company's latest health, safety, security and environmental regulations.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## Summarise



- Summarise possible health and safety threats at workplace.
- Summarise the parameters to check safety, security and health breaches.
- Summarise the importance of following company's safety policies.
- Summarise safety gears for retail workers.

## Notes



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## **UNIT 9.4: First Aid and Emergency Medical Plan**

## - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Define first aid
- 2. Describe the main objective of first aid
- 3. List emergency medicines
- 4. Identify the need for first aid

### 9.4.1. What is First Aid?





Ask the students to explain what first aid and emergency plan are.

### **Elaborate**



### Elaborate on the students' responses and mention the following:

- First aid refers to immediate medical attention given to injured or ill persons. The main objective of first aid is to provide immediate relief to the patient till proper medical aid arrives.
- An emergency medical plan should consider the following aspects:
  - » Communication
  - » Transportation
  - » Qualified first aider

## 9.4.2. Knowledge of Emergency Medicines





Ask the students to refer to the Participant Handbook for the list of medicines used in emergency situations.

## Tips



#### Provide the following tips to keep in mind about first aid kits:

- Check the expiry date of medicines
- Storage of medicines in a cool, dry and dark place
- Use suitable bottles/containers
- Arrange all medicines according to their functions
- Knowledge sharing

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## **Role Play**



- Ask two students to come forward for a role play on how to apply first aid.
- Ask one student to play the role of an employee who has been injured or has fallen ill while working.
- Ask the other student to play the role of the employee who needs to immediately arrange first aid for the injured or sick one.
- Ask the other student to follow the right steps of first aid and give medicine as per the cause.
- Provide feedback at the end of the role play.
- Repeat this role play with 2-3 more pair of students.



- Summarise what first aid is.
- Summarise the main objective of first aid.
- Summarise emergency medicines.
- Summarise the need for first aid.

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## **UNIT 9.5: Following Up the Emergency and Evacuation Plan**

## Unit Objectives



### At the end of this unit, students will be able to:

- 1. Distinguish between emergency and evacuation plans
- 2. Identify various symbols generally used in emergency and evacuation plans
- 3. List information included in an emergency plan
- 4. Explain to others how to help people evacuate the workplace

## 9.5.1. Emergency Plan and Evacuation Plan

## Resources to be Used



An emergency plan sample

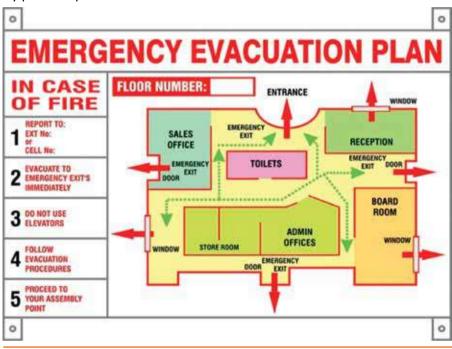


Fig. 9.3 Emergency Evacuation Plan

## **Practical**



- Show anemergency evacuation plan and explain its importance.
- Explain its components and the considerations while creating such plans.

## Explain



Explain that following issues that should be taken into account while training on emergency and evacuation plan:

- Individual employee's roles and responsibilities.
- Potential threat and hazards as well as protective actions.

- Communication and warning procedures.
- Procedure of responding to emergency.
- Placement and usage of important equipment during emergency situation.
- Procedures of emergency shutdown.



Ask the students to refer to the Participant Handbook for the meaning of various symbols used in an evacuation plan.



Fig. 9.4 Symbols Used in Emergency and Evacuation Plans

## 9.5.2. Knowledge of Emergency Exits

Do



Ask the students to refer to the Participant Handbook for the emergency exit symbol. Explain its importance.



Fig. 9.5 Emergency Exit Symbol

## Resources to be Used



A fire evacuation sample



Fig. 9.6 Responding to Fire Evacuation

## **Practical**

- Show a fire evacuation plan sample and explain its importance.
- Explain its components.

## 9.5.3. Helping Others During Evacuation



### **Explain the following points:**

- People tend to panic in an emergency situation and desperately look for support.
- In such a scenario, absolute cooperation and positive participation of employees is essential.



### Provide the following tips to protect and defend yourself, your business and your employees:

- Responding to an emergency before it takes place is the best way of protection.
- There are some people who can think logically and clearly in times of crises.
- Therefore, it is essential to have drills to train employees so that they can think clearly in times of crisis.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the between emergency and evacuation plans.
- Summarise various symbols generally used in emergency and evacuation plans.
- Summarise information included in an emergency plan.
- Summarise how to help people evacuate the workplace.

- Notes 🗒 —		

## **UNIT 9.6: Creating Better Work Environment**

## - Unit Objectives



### At the end of this unit, students will be able to:

- 1. Recognise importance of safe working environment
- 2. Explain employees' participation in maintaining safe-working environment
- 3. Define the objective and purpose of a mock-evacuation drill
- 4. Describe how to adopt eco-friendly working techniques

## 9.6.1. Safe Working Environment





Ask the students what thet consider as a safe working environment.

## **Elaborate**



### Elaborate on the students' responses and mention the following:

- Implementing and following safety plans is critical.
- Proper employee awareness related to various health hazards.

## **Explain**



### Explain the following measures to maintain a safe-working environment:

- Involve employees in health promotion activities
- Use formal and informal communication to increase employee awareness
- Provide adequate information
- Promotion activities should address individual need of employees

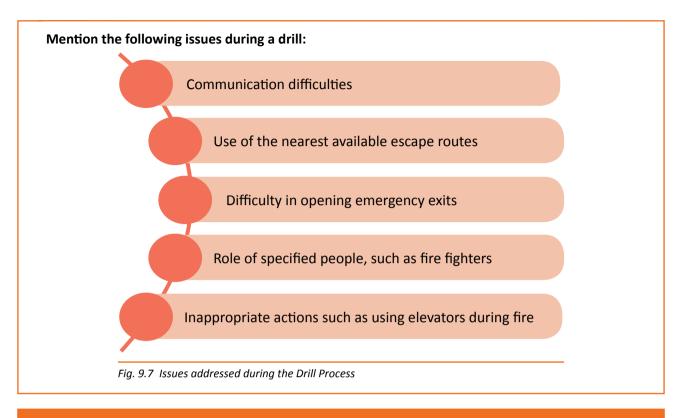
## 9.6.2. Performing Mock Evacuation Drills





### Mention the following objectives of a fire evacuation drill:

- To identify possible loopholes in evacuation strategy.
- To reevaluate effectiveness of evacuation procedure following recent alterations in the working practice.
- To familiarise new employees with the procedure.
- To test utility and effectiveness of the arrangement for people with disability.
- To identify and correct weaknesses in emergency communication procedures and systems.
- To gather feedback, either positive or negative, from the staff, particularly personnel with designated responsibilities.



## 9.6.3. Adopting Eco-Friendly Working Techniques



Employees should adopt eco-friendly working techniques in order to minimise the impact of their activities on the environment.

## Tips 🚇

### Provide the following tips:

- Switch to energy-efficient lighting
- Green cleaning
- Buy used fixtures
- Make bags and receipts optional
- Buy energy-efficient equipment
- Turn off your computer at night and when you are not using it for several hours
- Examine the availability of the products made from the renewable resources
- Cut packaging

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.
- Ask students to complete the exercise given in their guides.
- Assist them in completing the exercise, if required.



- Summarise the importance of safe working environment.
- Summarise employees' participation in maintaining safe-working environment.
- Summarise the objective and purpose of a mock-evacuation drill.
- Summarise how to adopt eco-friendly working techniques.

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# 10. Store Cleanliness and Hygiene

Unit 10.1 - Organisational Standards for Clean Work Areas

Unit 10.2 - Significance of Maintaining a Waste and Litter- Free Workplace

Unit 10.3 - Methods of Discarding Waste and Litter

Unit 10.4 - Health and Safety Risks Associated with Spillage

Unit 10.5 - Regular and Thorough Clean-up of Spillage

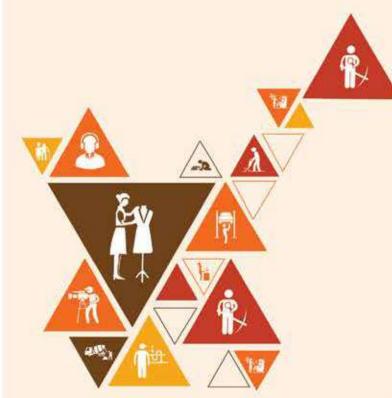
Unit 10.6 - Techniques of Reducing Spillage Risks

Unit 10.7 - Cleaning Equipment and Materials

Unit 10.8 - Storing Cleaning Equipment after Usage

Unit 10.9 - Cleaning a Store without Unsettling Customers

UNIT 10.10 - Effective Cleaning Practices and Techniques



## **Key Learning Outcomes** $\heartsuit$

### At the end of this module, students will be able to:

- 1. List various company standards pertaining to ensuring clean work areas
- 2. Describe the importance of maintaining a litter-free and waste-free workplace
- 3. Describe the procedures of discarding waste and litter
- 4. Explain health and safety risks associated with spillage
- 5. Identify techniques for reducing risk of spillage
- 6. List various cleaning materials and equipment used in a retail environment
- 7. Describe proper storage of cleaning equipment
- 8. List effective cleaning techniques and practices
- 9. Explain the importance of personal hygiene

## **Notes for Facilitation**



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

## **UNIT 10.1: Organisational Standards for Clean Work Areas**

## Unit Objectives 🧐

### At the end of this unit, students will be able to:

- 1. Outline organisational standards for cleanliness
- 2. Recognise the need for clean work areas
- 3. Explain housekeeping
- 4. Identify the need to maintain a housekeeping programme

## 10.1.1. Organisational Standards for Cleanliness





### These standards include information related to:

- Type of equipment used for cleaning.
- Scheduling cleaning activities.
- Procedures to reduce and dispose wastage and garbage.
- Preventive measures to keep the store dry and clean.

## 10.1.2. Clean Work Surfaces





### Explain what housekeeping includes:

- Keeping workplace neat and tidy
- Keeping up the floors and halls free of trip and slip hazards
- Removing waste materials, such as cardboard and paper.
- Eliminating fire-related hazards from workplace

### Explain paying attention to important details such as:

- Layout of the entire work area
- Aisle marking
- Adequacy of storage facilities
- Maintenance

## 10.1.3. Maintaining a Housekeeping Programme

## Say



Housekeeping must be a part of all the tasks, operations and processes which are performed at work areas. Special efforts are required in high traffic zones like:

- Around ladders, platforms and stairs
- Around work stations
- Around machines
- Around storage areas

## Tips



Provide the following tips for maintaining a good housekeeping programme:

- Walk-through surveys should be conducted as they help in identifying, evaluating and controlling the hazards due to lack of proper housekeeping practices at workplace
- One of the most effective tools in tracking the housekeeping performance and communicating the successes is 'Survey Checklist'

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## **Summarise**



- Summarise organisational standards for cleanliness.
- Summarise the need for clean work areas.
- Summarise what housekeeping is.
- Summarise the need to maintain a housekeeping programme.

## - Notes



## **UNIT 10.2: Significance of Maintaining a Waste and Litter-Free Workplace**

## - Unit Objectives

### At the end of this unit, students will be able to:

- Identify the need for maintaining waste-free workplace 1.
- Describe impact of litter-free workplace on customers 2.
- 3. Explain the need for waste reduction
- 4. Outline the techniques to reduce waste

## 10.2.1. Maintaining a Waste-Free Workplace





Ask the students what they will do to maintain a waste-free workplace.



Maintaining a waste-free workplace ensures proper hygiene in the store and creates a pleasurable shopping experience for customers.

## **Field Visit**



- Conduct a field visit to a nearby retail store.
- Ask students to observe the level of cleanliness at the store, particularly work surfaces.
- Assist them, whenever required, and resolve their queries.
- Ask them to share their observations.

## 10.2.2. Waste Reduction



### Provide the following tips:

- Make waste reduction an agenda; not just a guideline
- In-house e-mails and newsletter are used in order to give advice and guide the retail employees on issues and problems being addressed by the group
- Arrange a periodic 'eco column' with the help of a media company through 'advertorial' in order to promote issues of environment which are being handled by retailers and various shopping centres so as to minimise waste
- Set-up an outlet within the store so as to make shoppers aware about the improvement in the environmental performance

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the need for maintaining waste-free workplace.
- Summarise the impact of litter-free workplace on customers.
- Summarise the need for waste reduction.
- Summarise the techniques to reduce waste.

- Notes 🗐 -			

## **UNIT 10.3: Methods of Discarding Waste and Litter**

## - Unit Objectives



### At the end of this unit, students will be able to:

- 1. Recognise need for discarding waste
- 2. List the four R's of waste removal
- 3. Identify methods for discarding waste
- 4. List ways to ensure a clean and tidy workplace

## 10.3.1. Need for Discarding Waste





Ask the students what they think is the need to discard waste.

## **Elaborate**



### Elaborate on students' responses and mention the strategies for removing waste:

- Reduction
- Reuse
- Recycle
- Disposal

## 10.3.2. Methods of Discarding Waste

## Example



Assume you are an employee in a retail store. While discarding waste and litter, you should pack or unpack products carefully in a way that it generates less noise, causing minimum disturbance to customers in the store. Use of equipments and machines that cause loud noise should also be avoided. Waste and litter collection activities should ideally be performed during less traffic hours in the store. You should also encourage customers to throw plastic or other waste in dustbins.

## Tips



### Provide the following tips:

- Availability of adequate trash containers must be there in parking areas and inside and outside
  of the building entrances.
- Replace damaged, dirty and broken containers.
- Follow the procedure of draining and clearing trash containers. Try to avoid having trash emptied on an 'as required' basis.
- Trash containers must be covered so as to prevent trash from blowing or spilling out.

- Employees may pick up trash from anywhere in and around the workplace.
- Put tied bags of trash only in outdoor dumpsters. This will help in reducing the chances of spilling of loose trash at the time of collection.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the need for discarding waste.
- Summarise the four R's of waste removal.
- Summarise methods for discarding waste.
- Summarise ways to ensure a clean and tidy workplace.

Notes 🗐				
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## **UNIT 10.4: Health and Safety Risks Associated with Spillage**

## -Unit Objectives 🍱



### At the end of this unit, students will be able to:

- Identify health risks associated with spillage
- List some health hazards of spillage
- 3. Explain risk management
- List some measures for risk management

## 10.4.1. Health Risks with Spillage





### Explain the following safety and health risks associated with spillage of these products:

- Suffocation
- Fire
- Slips
- Other hazards related to health

## 10.4.2. Risk Management





You must make sure that the risk assessment which you are needed to perform must be according to law.



### Provide the following tips to manage the risks related to workplace:

- Identify the risk that may cause trip or slip injuries at your work areas
- Choose effective and appropriate control measures so as to prevent accidents
- Put the control measures laid down into action
- Find out the reasons behind accidents and also who could be injured

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise health risks associated with spillage.
- Summarise some health hazards of spillage.
- Summarise risk management.
- Summarise some measures for risk management.

Notes 🗐			

## **UNIT 10.5: Regular and Thorough Clean-up of Spillage**

## - Unit Objectives



### At the end of this unit, students will be able to:

- 1. Describe the need for cleaning spillage
- 2. Identify need for regular checking for spillage
- 3. Describe guidelines to keep work surfaces clean in a retail environment
- 4. List ways to execute planned and safe clean up of spillage

## 10.5.1. Clean-up of Spillage





- Follow instructions that describe the procedures for cleaning and disposing materials.
- It is essential that workers wear protective equipment, such as apron, goggles and gloves while cleaning the spillage. Next, spilled product and materials used for cleaning the spillage should be kept inside a container, which should be labelled properly.

## 10.5.2. Routine Check of Spillage at Retail Store





It is necessary that spillage is detected and cleaned immediately. For this, it is necessary to carry out routine checking for spillage in the store.

# 10.5.3. Guidelines to Keep Work Surfaces Clean in a Retail Environment

## **Explain**



### **Explain the following guidelines:**

- Get the materials and equipment which are adequate for the work surfaces that require cleaning.
- Keep the risk of spillage to the least and clear-out the spillage quickly and carefully.
- Safely place the cleaning materials and equipments or any other items which has to be moved.
- Disposal of waste and rubbish should be done safely and promptly.
- Disturb other persons as little as possible at the time of cleaning the work surface areas.
- Keep cleaning materials and equipments promptly and correctly after you have finished cleaning.
- Make sure that work surface areas are cleaned thoroughly.

# Tips 🗓

### Provide the following tips:

- During cleaning processes, it is important to wear personal protective equipment and clothing.
- Get rid of all physical debris, dirt and dust from work surface areas.
- Clean all work surface areas with warm water and neutral detergent solution when visibly soiled or before and after every session.
- Neutralise the equipment which requires special processing with QMS (Quality Management Systems) so as to make sure of its full compliance with sterilisation, disinfection and cleaning protocols.
- Dry entire work surface areas before and after use.
- Store and maintain cleaning materials and equipment.
- Replace surface covers wherever required.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the need for cleaning spillage.
- Summarise the need for regular checking for spillage.
- Summarise guidelines to keep work surfaces clean in a retail environment.
- Summarise ways to execute planned and safe clean up of spillage.

Notes 📃			

## **UNIT 10.6: Techniques of Reducing Spillage Risks**

## - Unit Objectives



### At the end of this unit, students will be able to:

- List the steps to reduce spillage risks
- Discuss how cleaning spills can avoid injury to workers

## 10.6.1. Minimise Spillage Risk





It is possible for someone to slip on the spillage, which may lead to sprains, fractures, or serious back or head injuries.

# Steps: Reduce Spillage Risks 🖃





**STEP 1:** Ensuring suitable product storage.



**STEP 2:** Practising appropriate disposal of wastages



**STEP 3:** Following appropriate processes for cleaning of spillage.



STEP 4: Using protective equipment and tools.



STEP 5: Knowledge about emergency phone numbers placed in product storage area and calling up whenever required.



STEP 6: Storing spill-kit in an easily accessible area.

## **Field Visit**



- Conduct a field visit to a nearby retail store.
- Ask students to enquire with the manager or staff about various precautions they follow to minimise risks associated with product spillage.
- Assist them, whenever required, and resolve their queries.
- Ask them to enlist the procedures practised by their employees to clean spillage.

## 10.6.2. Avoid Injury to Workers

## Say



Hazardous and harmful products can create big problems to retailers, if they arrive in or spill out of damaged containers. Such products are:

- Pesticides
- Solvents
- Concrete cleaners
- Strippers
- Lye
- Fuels

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the steps to reduce spillage risks.
- Summarise how cleaning spills can avoid injury to workers.

## **UNIT 10.7: Cleaning Equipment and Materials**

## - Unit Objectives 🎑



### At the end of this unit, students will be able to:

- List common cleaning equipment used in retail stores
- 2. Identify equipment used to clean spillage
- 3. Distinguish between mechanical and chemical methods to clean spillage
- 4. List best practices for maintenance of cleaning equipment

## 10.7.1. Cleaning Equipment





### The following materials and equipment are used in retail stores for cleaning:

- Garbage containers
- **Sweepers**
- **Buckets**

## 10.7.2. Equipment Used to Clean Spillage





### Explain the various methods of cleaning up the oil spill:

- Mechanical means to contain as well as recover the oil
- Chemical means to clean and disperse it





### Certain protective equipments are absolutely necessary while cleaning spills are:

- Gloves and towels
- **Dusters and brushes**
- Sponges and scouring pads

## **Example**



You have been assigned the responsibility of purchasing new cleaning equipments for your store. Prior to making the purchase, you wish to determine and ensure safety of equipments. For this purpose, the following aspects about them should be considered:

- Usability
- Weight
- Size

- Movability around the store
- Breakability
- Repairability

## **Field Visit**



- Conduct a filed visit to a nearby car showroom and a gift ship.
- Ask students to enquire the staff members about what cleaning equipment they require and how to store cleaning equipment properly on a daily basis.
- Assist them, whenever required, and resolve their queries.
- Ask them to compare the difference between the two based on your observation.

## Tips



### Provide the following tips handling cleaning equipment:

- Understand correct and safe operating practices for each item of the equipment.
- Choose the right equipment for the task and know how to use each item correctly and safely.
- Maintain equipment in good working order and store all items dry.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## **Summarise**



- Summarise common cleaning equipment used in retail stores.
- Summarise equipment used to clean spillage.
- Summarise between mechanical and chemical methods to clean spillage.
- Summarise best practices for maintenance of cleaning equipment.

## Notes



## **UNIT 10.8: Storing Cleaning Equipment after Usage**

## **Unit Objectives**



### At the end of this unit, students will be able to:

- 1. Describe the need of storing equipment properly
- 2. Explain need to clean equipment after usage
- 3. List ways to store cleaning equipment after use

## 10.8.1. Storing Cleaning Equipment

## Say



### Storing cleaning equipment properly after use helps a retail store in:

- Preventing damage to the equipment.
- Guarding the equipment against loss or theft.
- Ensuring accessibility of the equipment.
- Ensuring safety of workers and customers.
- Guarding equipments against environmental hazards.

## 10.8.2. Storing Equipment Properly





### **Explain the following points:**

- Store employees need to use cleaning equipments daily.
- Hence, they need to be stored properly to minimise damage to them and ensure their long life.

## 10.8.3. Regular Maintenance of Equipments





### Before storing cleaning equipment, you should ensure the following:

- Tanks of recovery should be rinsed and emptied.
- Shut-off filters should be cleaned up. Leave the lids open in order to keep them dry.
- Solution tanks should be emptied. Leaving solution in the tank will gum up filters and may have impact on their performance.
- Pads/brushes must be cleaned as well as rinsed after each and every use.
- Squeezers and vacuum ports must be cleaned after every use before soil dries up.
- Jets must be regularly maintained so that they spray evenly. Soak them in water and vinegar mixture overnight so as to keep down the mineral deposits

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the need of storing equipment properly.
- Summarise need to clean equipment after usage.
- Summarise ways to store cleaning equipment after use.

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## **UNIT 10.9: Cleaning a Store without Unsettling Customers**

## -Unit Objectives 💆



### At the end of this unit, students will be able to:

- 1. List best practices for cleaning retail store
- 2. Explain health and safety regulations for cleaning store
- 3. List ways to clean floors properly

## 10.9.1. Cleaning a Store



### **Explain the following points:**

- Make use of low noise-generating equipments and materials.
- Cleaning should preferably be done before the opening of the store and during non-peak hours. Waste should be disposed of in a proper place.
- Also, solvents with pungent odour should be avoided.

## 10.9.2. Health and Safety Regulations for Cleaning Store





### Services related to retail cleaning include:

- Cleaning of carpets, public area, windows, concourse surfaces, large floor areas, etc.
- Keeping the ventilation proper
- Hygienic washroom and public convenience facilities

## Tips



### Provide the following tips for floor cleaning:

- Vacuum carpets and clean hard floors daily
- Sweeping with an ordinary broom releases dust and bacteria into the air and so it is not suitable.
- Choose a method that avoids this, such as:
  - » A vacuum cleaner that retains particles and directs exhaust away from the floor
  - » A ducted vacuum cleaner, with a dust-retaining mop, using detergent and hot water
- Wipe or mop the surface until it is thoroughly wet, then use clean dry cloth or wrung mop heads to soak up all excess fluid
- If weather conditions or poor ventilation prevents rapid drying, you may need to wipe the surface dry

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise best practices for cleaning retail store.
- Summarise health and safety regulations for cleaning store.
- Summarise ways to clean floors properly.

- Notes			
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## **UNIT 10.10: Effective Cleaning Practices and Techniques**

## **Unit Objectives**



### At the end of this unit, students will be able to:

- 1. Describe various effective cleaning practices
- 2. List appropriate cleaning practices
- 3. Identify some effective cleaning techniques
- 4. List tools to make cleaning easy

## 10.10.1. Effective Cleaning Practices





### **Explain the following points:**

- After each use, equipments must be thoroughly washed and cleaned regularly.
- It is important for every employee to follow the predefined guidelines and standards.

## 10.10.2. Effective Cleaning Practices





### **Explain the following points:**

- Appropriate cleaning practices are started by using basic items such as powders, cleaners, detergents and ensure that you do not make any mistake.
- In the case of polishing of wooden furniture, do not go overboard with the polish.

## Field Visit



- Conduct a field visit to a nearby retail store.
- Ask students to enquire the cleaning staff about various procedures they follow to ensure safe disposal of waste products or clothing.
- Ask them to determine if the employees follow these practices properly and efficiently.
- Assist them, whenever required, and resolve their gueries.
- Ask them to prepare a report on these topics.

## 10.10.3. How to Incorporate Effective Cleaning Techniques

## Say

## <u>•</u>

### Following are some of the tips related to the effective cleaning:

- Begin from the edge of the carpet or floor so that you do not step into wet and clean area.
- Shelves can be dusted by using a handled tray. Remove the things from the shelf while cleaning both food items and shelf.
- Walls must be washed and wiped thoroughly.
- Long, firm and one-directional strokes must be used while sweeping with hand-sized, bristle brushes.
- Fold your duster into a small pad and turn it over every time you clean the different section of the furniture.
- Sweep the area by using the brush strokes.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.
- Ask students to complete the exercise given in their guides.
- Assist them in completing the exercise, if required.

## **Summarise**



- Summarise various effective cleaning practices.
- Summarise appropriate cleaning practices.
- Summarise some effective cleaning techniques.
- Summarise tools to make cleaning easy.

## - Notes



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# 11. Providing Information and Advice to Customers

Unit 11.1 - Information on Products and Services

Unit 11.2 - Acknowledging Customer Loyalty and Confidence

Unit 11.3 - Handling Angry Customers

Unit 11.4 - Maintaining Customer Loyalty while Dealing with Complaints

Unit 11.5 - Customer and Trader Rights



## Key Learning Outcomes 💆

### At the end of this module, students will be able to:

- Analyse product and service-related information relevant to customers 1.
- 2. Describe company policies pertaining to providing product-related information and advice to customers
- Assess customers' need for product information and advice 3.
- Explain the process of delivering clear and accurate product information to customers 4.
- 5. Recognise the importance of customer loyalty and confidence
- Devise various company policies on handling customers' complaints 6.
- 7. Discuss how to sort out a customer's complaints
- 8. Analyse the importance of providing accurate and transparent information

## Notes for Facilitation



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

## **UNIT 11.1: Information on Products and Services**

## **Unit Objectives**



#### At the end of this unit, students will be able to:

- 1. Demonstrate ways to pass on information to customers
- 2. Discuss role of salesperson in giving product information
- Recognise need to provide clear and accurate information 3.
- 4. Identify salesperson's role in satisfying customer queries

## 11.1.1. Providing Information to Customer



- Ask the students to list what practices they will follow to provide information to customers.
- Provide the following pointers:
- Always provide correct and accurate information about products or services to customers.
- Assist customers in selecting the right products as per their requirement.
- Do not manipulate any information related to products.
- State the terms and conditions for buying products clearly.
- Do not force any customer to buy a particular product.
- Give appropriate advice to customers.
- Check quality and condition of products thoroughly prior to selling them to customers.

## 11.1.2. Product Information Given by Salesperson

## Explain 🖺



#### **Explain the following points:**

- A salesperson must have complete knowledge about products in order to provide accurate and clear information to customers.
- A customer can ask any question related to the product and the salesperson should be able to handle all queries in the best possible manner.

## 11.1.3. Providing Clear and Accurate Information



A salesperson should perform the following in case a customer seems unsatisfied by the product information provided to him or her:

Give product demo to the customer.

- 2. Provide brochures and pamphlets of the product.
- 3. Show a different variety in the same product category.

## **Example Q**

Banks must provide complete details related to loans to potential creditors. These details include pre-conditions for receiving a loan, number of installments to repay the loan, total time duration, interest rate charged by the bank, individual installments amount, surplus amount to be paid upon exceeding the due date, various terms and conditions pertaining to the loan, as well as existing government rules or policies associated with the loan.

## **Field Visit**



- Conduct a field visit to a nearby shopping mall.
- Divide students into teams of 3-4 team each and assign each team a store to study.
- Ask students to enquire with a sales staff about any product of their choice.
- Ask them to note their observations as a team and prepare a report.
- Assist them, whenever required, and resolve their queries.

## 11.1.4. Salesperson's Role in Satisfying Customer Queries

## **Explain**

### **Explain the following points:**

- A sales person without product knowledge is not acceptable.
- A positive customer response comes to the sales people who are enthusiastic and are passionate about their product and are also keen to share benefits with customers.

## 11.1.5. Providing Product Information

## **Explain**



#### Explain creative and conventional methods to enhance product or service-related knowledge:

- Personal experience of product
- Product literature such as catalogues and brochures
- Online forums
- Customers' feedback
- Publications related to trade and industry
- Internal sales records
- Information collected from team members
- Knowledge gained from visits to manufacturers
- Sales training programmes
- Information of competitors

# **Example Q**

A salesperson working in a car dealership is unable to help a particular customer with a car model. He does not seem to be fully aware of vehicle features, like mileage and engine CC. The salesperson then connects the customer to the product manager of the store who can help the customer directly.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise ways to pass on information to customers.
- Summarise the role of salesperson in giving product information.
- Summarise the need to provide clear and accurate information.
- Summarise the salesperson's role in satisfying customer queries.

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## **UNIT 11.2.** Acknowledging Customer Loyalty and Confidence

## - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Identify why customer loyalty is essential for retailers
- 2. Discuss ways to attract customer satisfaction and loyalty
- 3. Identify reasons for customer dissatisfaction
- 4. Recognise policies to handle customer complaints

## 11.2.1. Customer Loyalty



Explain why customer confidence and loyalty is highly essential.

## **Field Visit**



- Conduct a field visit to a nearby shopping mall.
- Ask students to observe how the sales staff is interacting with customers
- Ask them to note how patient and polite the salespersons are while interacting with customers.
- Assist them, whenever required, and resolve their queries.
- Ask them to share their experiences.

## 11.2.2. Ways to Attract Customer Satisfaction and Loyalty





While providing product information to customers, a salesperson can attract customer satisfaction and loyalty by adhering to the following:

- Being polite and patient while providing product information to customers.
- Ensuring that information is conveyed in the simplest form.
- Giving references of some repeat customers of the store.
- Handling customers calmly, even when they ask difficult questions.

### Do



- Ask students to refer to their Participant Handbooks for the chart on several reasons for customer dissatisfaction.
- Also, ask them to read the various acts in place to deal with customers' complaints.
- Provide them the tip of online chat services, which positively influenced their attitude about the retailer.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise why customer loyalty is essential for retailers.
- Summarise ways to attract customer satisfaction and loyalty.
- Summarise reasons for customer dissatisfaction
- Summarise the policies to handle customer complaints.


## **UNIT 11.3: Handling Angry Customers**

## - Unit Objectives



#### At the end of this unit, students will be able to:

- List steps to handle angry customers
- 2. Identify measures to resolve customer complaints
- 3. Interpret how to escalate customer complaints
- Analyse how to identify the nature of the complaint 4.

## 11.3.1. Handling Customers





#### **Explain the following steps:**

#### Listening

Listen potiently to customers



#### Removing

Politely take away angry customers from the service area to cause minimum disturbance to other customers



### **Acknowledging**

Acknowledge mistakes by apologising and giving assurance to resolve the issue in the best possible manner



#### **Asking**

Ask customers what they would require at this juncture



#### **Telling**

Enlist various ways by which the organisation can resolve the problem



#### Referring

Direct the query to higher authority, in case it cannot be handled effectiverly at the lower level



### **Enquiring**

Once a solutions has been reached at, ask customers if they are satisfied with the solution



#### **Receiving Feedback**

Request customer for a feedback

Fig. 11.1 Steps for Handling Customers

#### Explain key ways to resolve customer complaints are:

Analyse actual nature of complaint, whether they are related to fault in product, price or value for money

Ask relevant questions to obtain more information on the problem

Clarify to the customer that the complaint has been understood

Suggest a possible solution to the customer, such as repair or exchange of product

Suggest other alternatives such as resolving the issue through on ombudsman

Resolve the problem quickly and close the complain

Fig. 11.2 Ways to Resolve Customer Complaints

#### Explain the situations in which issues need to be escalated:

When the customer support executive is not authorised to handle certain complaint

When customer support processes are inefficient and fail to deliver the desired result

When time required to resolve an issue has lapsed

Fig. 11.3 Conditions for Escalation of Issues

## 11.3.2. Evaluation of Complaints





A salesperson should accurately evaluate a customer's complaints by following these guidelines:

- Listen patiently to the customer.
- Examine and evaluate root cause of the complaint.
- Identify possible solutions for resolving the conflict.
- Select and provide the most appropriate solution for the problem.

## Field Visit



- Conduct a field visit to a nearby retail store.
- Ask students to ask the store manager about the escalation matrix used to transfer customer complaints to higher authorities.
- Assist them, whenever required, and resolve their queries.
- Ask them to share their experiences.

## **Role Play**



- Ask two students to come forward for a role play on handling angry customers.
- Ask one of the students to play the role of a trainee associate.
- Ask the other student to play the role of the angry customer who is angry about the damaged product provided.
- Ask them to mimic the situation.
- Tell that the trainee associate needs to play wisely in such situations.
- Provide feedback at the end of the role play on what could have been better.
- If the time allows, conduct the same role play with another pair of students.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## **Summarise**



- Summarise steps to handle angry customers.
- Summarise measures to resolve customer complaints.
- Summarise how to escalate customer complaints.
- Summarise how to identify the nature of the complaint.

## Notes



# UNIT 11.4: Maintaining Customer Loyalty while Dealing with Complaints

## - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. List ways to maintain customer loyalty
- 2. Identify need to provide solutions instead of arguing with customer
- 3. Recognise importance of dealing with customers
- 4. List customer-oriented tips

## 11.4.1. Maintaining Customer Loyalty





### Explain ways to maintain customer loyalty:

- Dealing calmly and politely with customers, even the angry ones.
- Being attentive to the customers' problems.
- Providing adequate solutions to customers instead of entering into an argument with them.

## **Tips**



### Provide the following customer-oriented tips:

- Listen carefully to customers; let them finish first.
- Questions should be asked in a polite, caring, concerned and humble manner
- Put yourself in the customer's shoes
- Apologise without blaming
- Find out by asking customers that which solution is acceptable to them
- Solve the problem or find someone who can solve it— quickly!

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise ways to maintain customer loyalty.
- Summarise the need to provide solutions instead of arguing with customer.
- Summarise the importance of dealing with customers.
- Summarise customer-oriented tips.

## **UNIT 11.5: Customer and Trader Rights**

## - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Distinguish between consumer and trader
- 2. Identify the rights of customers
- 3. Recognise your duty to uphold customer rights

## 11.5.1. Consumer and Trader





Ask the students the difference between a consumer and trader.

## **Elaborate**



#### Elaborate on students' responses and explain the following:

- Trader is a person who performs activities related to his/her business, trade, profession or craft.
- Remember, if a person purchases or deals with a trader for doing further business, that is, if a person purchases goods for business purposes (furthers sales) he is not considered as a consumer in legal sense. So, consumer should represent the person purchasing goods for consumption.

## 11.5.2. Trader/Customer Rights

## **Explain**



### **Explain the following rights:**

- Right to obtain complete information about the product.
- Right to purchase a product as per own will.
- Right to negotiate product price with the retailer.
- Right to complain about any product related problems or about the disappointing behaviour of the salesperson during interaction.
- Right to return purchased goods as per the retailer's policy.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.

- Ask students to complete the exercise given in their guides.
- Assist them in completing the exercise, if required.



- Summarise the difference between consumer and trader.
- Summarise the rights of customers.
- Summarise your duty to uphold customer rights.

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# 12. Positive Presentation of Yourself

Unit 12.1 - Defining an Organisation

Unit 12.2 - Understanding Basic Etiquette

Unit 12.3 - Dealing with Customer

Unit 12.4 - Responding to Customer

Unit 12.5 - Assisting the Customer



## Key Learning Outcomes 💆

### At the end of this module, students will be able to:

- 1. Discuss the meaning of an organisation
- 2. Describe the procedure of working effectively in an organisation
- 3. Describe basic etiquette toward colleagues
- 4. Handle customer replies or queries efficiently
- 5. Deal with customers appropriately
- 6. List ways of responding to customers
- 7. Understand importance of updating customers
- 8. Discuss importance of documentation

## **Notes for Facilitation**



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

## **UNIT 12.1: Defining an Organisation**

## **Unit Objectives**

#### At the end of this unit, students will be able to:

- Explain the basics of an organisation 1.
- Describe organisational behaviour policies for customers 2.
- List organisational behaviour policies for colleagues

## 12.1.1. Definition of Organisation



Ask the students to explain what they understand by the term 'organisation'.





- An organisation refers to a group of people who work together to achieve common goals.
- Following basic social guidelines and etiquettes can encourage employees to adopt good communication skills and present themselves positively in front of others.

## 12.1.2. Organisational Behaviour Policies for Customer, **Colleagues and Seniors**





#### Explain key behavioural guidelines that must be followed by employees while attending a customer:

- Always welcome the customer with a smile.
- Greet the customer using "Sir or Madam" and not by their first name.
- Introduce yourself politely to the customer.
- Offer a seat to the customer.
- Ask the customer for refreshment, and give preference to their choice.
- Convince customers that you will try to do your best in assisting them.
- Avoid giving casual or unattentive looks to the customer.
- Do not chew gum or tobacco while speaking to customers.



Ask the students to refer to their Participant Handbooks for guidelines to interact with colleagues and senior organisation members.

## Resources to be Used



Participant Handbook and pencil

## **Activity**



- Ask the students to refer to their Participant Handbooks.
- 2. Ask them to self-analyse their behaviour and fill in the table given.
- 3. Ask them to share their experiences.

You can choose more than one option	Respectful	Honest	Responsible	Patient
Customers				
Children				
Senior Citizens				
Collegues				
Seniors				
Helper Staff				

Skill Practice	Time	Resources
Analysing Customer Behaviour	1 hour	Pen and paper

### Provide the following customer-oriented tips:

- Always remain attentive toward the customers' needs and wants
- Do not argue with colleagues over petty issues simply to satisfy your ego
- Do not argue with seniors over personal issues, such as leaves or breaks

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise the basics of an organisation.
- Summarise the organisational behaviour policies for customers.
- Summarise organisational behaviour policies for colleagues.

## **UNIT 12.2: Understanding Basic Etiquette**

## -Unit Objectives 🛚

### At the end of this unit, students will be able to:

- 1. Select basic etiquette while interacting with internal and external customers
- 2. Discuss the grooming standards for employees
- 3. Apply general guidelines while communicating with customer
- 4. Answer customers questions in simplified manners

## 12.2.1. Guidelines for Socially Acceptable Behaviour





Ask the students what they think are the basic etiquette for a socially acceptable behaviour.

## **Elaborate**



### Elaborate on students' responses and explain the following etiquette:

- Establishing and maintaining good eye contact.
- Remembering names of customers and colleagues.
- Dressing appropriately.
- Listening patiently and thinking before speaking.
- Using polite words like "thank you" and "please" whenever required.

## 12.2.2. Grooming Standards for Female and Male Employees





Certain grooming standards for female employees at a retail store are:

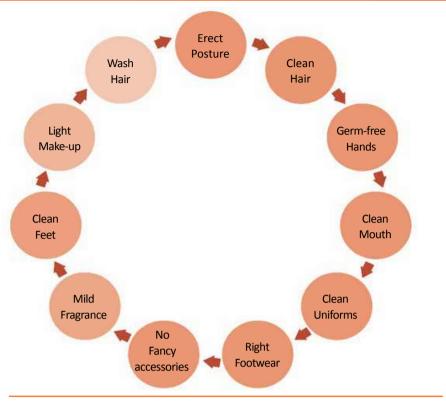


Fig. 12.1 Grooming Standards for Female Employees

Grooming standards, set in an organisation's Standard Operating Procedures (SOP), guide employees regarding their appearance, the way to maintain positive public image and enhancing personal safety tips.

## 12.2.3. General Guidelines to Communicate with Customers



Ask the students to explain how to communicate with customers. If required, initiate a discussion.

## Say 🕒

- Communication should contain all necessary information to generate positive response from customers.
- Employees must try and answer all questions asked by a customer.
- Communication should not contain unnecessary details. This helps in saving valuable time, both for the customer and the employee.
- While communicating, employees should take into consideration the mindset, views, thoughts of the customer.
- The communication should be based on actual facts and figures related to the product or service.
- Communication with customers should be specific and focused. Details provided should be absolute and definite. Employees should avoid making obscure and vague statements that may be unclear to the customer.

# 12.2.4. Use of Simple Phrases and Questions to Avoid Confusion

## Explain

## in 🗓

#### **Explain the following points:**

- Communication should be clear and easily comprehendible to the customer.
- Conveying clear information facilitates the customer and employee in understanding each other's perceptions and requirements.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise basic etiquette while interacting with internal and external customers.
- Summarise the grooming standards for employees.
- Summarise general guidelines while communicating with customer.
- Summarise customers questions in simplified manners.

Notes 🗒			

## **UNIT 12.3: Dealing with Customer**

## - Unit Objectives

#### At the end of this unit, students will be able to:

- Discuss the importance of customer care
- 2. Apply guidelines to greet customers
- 3. Identify customer's perception and requirements
- 4. List ways to deliver quality services to customers

## 12.3.1. Importance of Customer Care

## **Explain**



#### **Explain the following points:**

- As customers are in hurry, they might be just looking for specific item and may need the assistance of the store employee.
- With so many online and physical retail options available now, if that first store doesn't satisfy customers' needs, there is always another one that will.

## 12.3.2. Greeting a Customer





#### Some general guidelines to greet customers include the following:

- Greet a customer with "Welcome", Namaste posture and a smile.
- Make customers feel comfortable and appreciated.
- Ask customers whether they have visited the shop earlier.
- Greet customers with "Good Morning/Good Afternoon/Good Evening" while speaking over the phone.
- Ask them respectfully "How may I help you"?
- Do not appear distracted while speaking with a customer.
- Do not instruct customer, such as saying "You will find the product over there." Instead, bring the product to the customer.
- Even if the customer doesn't buy anything from your store, be polite and say "Thank you for your visit. Please visit again".

## **Role Play**



- Ask two students to come forward for a role play of a customer handling activity.
- Ask one of the students to play the role of a sales associate at an electronics store.
- Ask the other students to play the role of customer who is visiting the store.

- Ask them to mimic the situation.
- Provide feedback at the end of the role play on what could have been better.

## 12.3.3. Understanding Customer's Perception and **Requirements and Providing Information Accordingly**

### Explain that Unwanted Service = Zero Services and provide the following example:

Mr. Anand is employed in Delhi and plans to visit Jaipur during vacation. He fails to make reservations with the state-owned roadways or railways. Hence, he decides to approach a well-known tours and travels provider. While speaking to an employee of the agency, Mr. Anand mentions the travelling dates and expresses his urgency, as he has to attend an important function in Jaipur. He would prefer travelling in A/C Volvo bus and doesn't mind paying a little extra for faster service. After going through the booking process, the employee starts forcing Mr. Anand to avail a discount voucher of 50% for hotel stay for 3 nights 2 days. Mr. Anand clearly refuses to avail the discount scheme. However, the employee presses his point even more. Out of frustration, Mr. Anand cancels his booking with the agency and approaches another tours and travels operator.

Analysis: We can conclude that Mr. Anand clearly expressed his urgency to attend a function in Jaipur and would not have mind paying extra for faster and timely services. However, the employee failed to realise his actual concern. Secondly, Mr. Anand had approached the agency only for ticket booking and was not expecting hotel booking offers. The employee, without seeking Mr Anand's opinion started forcing a hotel discount scheme on him, annoying the customer in the process. By offering a service, no matter it may be one of the best offers available without customer consent minimises the chances of striking a positive deal with him.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## Summarise



- Summarise the importance of customer care.
- Summarise guidelines to greet customers.
- Summarise customer's perception and requirements.
- Summarise ways to deliver quality services to customers.

## - Notes



## **UNIT 12.4: Responding to Customer**

## - Unit Objectives



#### At the end of this unit, students will be able to:

- 1. List various ways of responding to customer
- 2. Explain complex information to the customer
- 3. Change yourself to match the customer's behaviour
- 4. Tell customers about the new product or service
- 5. Show courtesy towards the customer
- 6. Provide the best solution to customers' query

## 12.4.1. Different Ways of Responding to the Customer

## Explain



## Explain the following guidelines that should be followed while responding to customers face-to-face:

- Maintain good body posture and use words like Sir/Madam while communicating.
- Gently ask customers the purpose of their visit.
- Respond calmly and promptly to customer queries or comments.
- Use simple gestures and words during the communication process, particularly in cases where language barriers exist.
- Promptly ask questions to reduce chances of misunderstandings or miscommunication.
- Display helpful and courteous behaviour towards the customer.

## Explain the following guidelines that should be followed while responding to customers on telephone:

- Give relevant details about your company.
- Use respectful words such as 'Sir/Madam.'
- Speak clearly and slowly and do not rush with sentences.
- Be gentle, courteous and polite while speaking over the phone.
- Be enthusiastic while conversing. Lethargic voice may give the impression of a carefree attitude, which may irritate or dissuade the customer.
- Sound confident on the call.
- In case of incoming calls, try to respond within three phone rings.
- Be armed with thorough knowledge about the product being offered. This facilitates in resolving customers' queries promptly and efficiently.
- State product benefits and advantages. This helps to attract the customer and create in his a need for that product.
- Avoid side conversations.
- Keep receiver close to the mouth, as speaking on the phone involves voice modulation and fine articulation.

• Try to converse in a language which can be easily understood by the customer as it would touch his sentiments and could give a positive result.

#### Explain the following guidelines to be followed while responding to customers through e-mails:

- Ensure appropriate subject in the subject line of the message.
- Write precise, crisp and to-the-point messages. A precise message allows better understandability and maintains the reader's attention.
- Ensure that body of the message is reader-centric; it should be able to attract the reader's attention.
- Avoid making grammatical and spelling mistakes.
- Avoid using capital letters, as it may convey anger or frustration.
- Message must be complete with all contact details, including the full name, designation, phone number, e-mail ID, address and company website.
- Scan all attachments before sending the message. Avoid attaching unnecessary files with the email.
- Mention a disclaimer, if any, at the end of the email.
- Re-read the mail carefully before hitting the send button.

## **Role Play**



- Ask three students to come forward for a role play of a customer handling activity.
- Ask one of the students to play the role of a sales associate at a store.
- Ask the other student to play the role of a customer. The third student needs to analyse them.
- Ask them to mimic the situation.
- Provide feedback at the end of the role play on what could have been better.

# 12.4.2. Explaining and Interpreting Complex Information to the Customer

## Example



Amit's grandfather recently developed deep interest in the Internet and wanted to purchase a tablet. He went to a retail store to ask for a decent tablet for himself. As soon as he entered the store, the trainee associate asked his requirement and started explaining the features of various tablets along with their specifications. The grandfather got confused as he had no idea about the specification like RAM, camera pixel, etc. He expressed his confusion to trainee associate, the associate instantly asked about the exact requirement or the purpose of purchasing the tablet. The grandfather explained, "I want to surf internet, view images, listen to bhajans over Youtube, etc." On the basis of his requirement, the Trainee Associate suggested three tablets and explained each and every specification in Hindi which the grandfather understood easily and decided to the purchase. The one which best suited his requirements.

## 12.4.3. Adopting Behaviour as per Customer Attitude





Explain the situations when customers get confused and angry.

## 12.4.4. Updating the Customer

## Explain

#### **Explain the following points:**

- In present times, print and digital media, including newspaper, television, telephone and e-mails are a common medium to reach out to customers.
- Retailers should keep their database updated to facilitate timely updation of information to customers, such as about a new product or service introduced by the company.

# 12.4.5. Maintaining Courteous behaviour with the customer towards the Customer

## Say



#### Certain tips for maintaining a courteous behaviour towards the customers:

- Always remember that customer satisfaction is of prime importance for any retailer.
- Listen to customer queries patiently. This allows prompt and satisfactory customer service.
- Anticipateemotionalneeds of customers regarding purchased goods.
- Give equal importance to each customer.
- Always convey clear message related to business systems and transactions.
- Always be prompt in resolving customer queries and problems.
- Do not hesitate to apologise in case a service gets delayed or goes wrong.
- Always welcome feedback from customers.

## Do



Ask the students to refer to their Participant Handbooks certain courtesy phrases that should be used by retailers.

## 12.4.6. Responding and Providing the Best Solution to the Customer



#### Mention the following guidelines:

Set a timeline for responding to the customer. For example, while responding through e-mail, preferably respond between 9:30 AM to 5:30 PM.

- Listen/read the customer's query carefully and quickly locate information that can be useful for him.
- Give accurate information about products or services offered by your organisation.
- Give enough time to customers to respond. Provide them with additional information, if required.
- Repeat the information if the customer still appears confused.
- Avoid using complex words or jargons while responding to customers. This may confuse them even more.
- If the query cannot be resolved instantly, seek time from the customer to consult your seniors or the concerned department.
- Revert to the customer as quickly as possible.

## 12.4.7. Explaining Delays and Non-Fulfillment of **Expectations to the Customer**

## **Explain**

### **Explain the following example:**

If a customer visits a watch showroom to get the wristband of his/her watch replaced, it can be handled instantly and on the spot. On the other hand, if the watch has stopped functioning due to water spillage the staff would have to inform the customer clearly that such an issue would require minimum two to three days time to get resolved. Certain customers might not accept their mistake and instead try to place whole blame on the organisation or store staff. They might also demand undue compensation or replacement. The retailer must handle such cases patiently and clearly explain the company's terms and conditions to the customer.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.



- Summarise various ways of responding to customer.
- Summarise complex information to the customer.
- Summarise how to match the customer's behaviour.
- Summarise how to tell customers about the new product or service.
- Summarise how to show courtesy towards the customer.
- Summarise the best solution to customers' query.

Notes 🗏			

## **UNIT 12.5: Assisting the Customer in Difficult Times**

## -Unit Objectives 🍱



#### At the end of this unit, students will be able to:

- Identify the AIM (Assess, Identify, Maintain) model for helping customers
- 2. List guestions to assess problems with the customer
- 3. Describe tips for maintaining customer relationship
- Discuss steps to maintain information database

## 12.5.1. AIM Model for Helping Customer





Ask the students if they know about the AIM model.

## **Explain**



### **Explain what AIM stands for:**

- Assess
- Identify
- Maintain

## 12.5.2. Assessing and Identifying the Problem of the Customer

## **Explain**



#### Explain questions that may be asked:

- What is your actual concern?
- It sounds like you have problems with...
- Are there other sources that you think would be useful in your case?
- Please help me understand your situation.

#### **Explain the following steps:**

- Identifying the problem
- Maintaining relationship

## **Field Visit**



- Conduct a field visit to nearby two retail stores.
- Ask students to interview customers visiting there and find out their problems, if any, and what solutions they have got from stores for their problems.

- Assist them, whenever required, and resolve their queries.
- Ask them to share their observations.

## 12.5.3. Maintaining Information Database

## Say



Database refers to a large amount of information stored in a manner that it can be searched and retrieved easily. When computers were not used, all information was recorded and compiled using manual methods. With the advent of computer, several softwares are now available in the market that facilitate companies in maintaining and updating their database regularly.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.
- Ask students to complete the exercise given in their guides.
- Assist them in completing the exercise, if required.

## Summarise



- Summarise the AIM (Assess, Identify, Maintain) model for helping customers.
- Summarise questions to assess problems with the customer.
- Summarise tips for maintaining customer relationship.
- Summarise steps to maintain information database.

## Notes



-Notes 🗐 ———	
Notes 🖃	











# 13. Work Effectively in a Retail Team

Unit 13.1 - Effective Teamwork

Unit 13.2 - Sharing Information and Making Commitments with Colleagues

Unit 13.3 - Resolving Conflicts with Colleagues



## **Key Learning Outcomes V**

### At the end of this module, students will be able to:

- 1. Describe communication etiquettes in a retail store
- 2. Discuss the importance of building cordial relationships with colleagues
- 3. Describe the method of building healthy relationship with colleagues
- 4. Define various ways to work with colleagues
- 5. Describe various benefits of effective listening
- 6. Discuss information sharing and making commitments with colleagues
- 7. List different methods for resolving conflicts between colleagues
- 8. Describe the importance of effective teamwork

## **Notes for Facilitation**



- Ask the students about the expectations from the module.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the module.
- Start with a positive and happy note.

## **UNIT 13.1: Effective Teamwork**

## Unit Objectives



#### At the end of this unit, students will be able to:

- 1. Discuss how to build healthy relationships with colleagues
- 2. Recognise the need to show respect to colleagues and managers
- 3. Explain the importance of planning and organising daily work routine
- 4. List ways to work effectively with co-workers

## 13.1.1. Building Healthy Relationship with Colleagues





### Explain how to build healthy relationship with colleagues:

- Sharing at Meetings: Share your proficiency and knowledge openly with colleagues.
- Speaking Politely: Speak softly, politely and patiently with colleagues.
- Being Supportive: Express concern toward others and be ready to help them.
- Collaborating Efforts: Encourage your colleagues to work in collaboration with one another.
- Being Appreciative: Appreciate your colleagues for their efficiency and productivity.

## 13.1.2. Showing Respect to Colleagues and Managers





Ask the students how they will show respect to colleagues and managers.

## **Explain**



#### Elaborate on the students' responses and explain the following methods:

- Treat everyone at workplace with kindness, courtesy and politeness.
- Be positive and open to accepting feedback from seniors.
- Do not criticise others, especially subordinates, over petty issues.
- Do not force personal decisions on others.
- Allow others to freely express their views and ideas

## 13.1.3. Planning and Organising Daily Work Routine





Ask the students how they plan and organise daily work routine.

## **Explain**



Elaborate on the students' responses and explain the following point: Planning and organising tasks at individual as well as team level facilitates in improving the effectiveness of work.

## 13.1.4. Working with Colleagues to Achieve Targets

## **Explain**



#### Explain how to work with colleagues to achieve targets:

- Take accountability for your work.
- Recognise and appreciate contributions from other team members.
- Offer emotional support to colleagues, such as encouragement and empathy.
- Ask guestions to identify and understand requirements of co-workers.
- Comply with company's rules and policies at all times.

## **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

## **Role Play**



- Ask two students to come forward for a role play on working with colleagues.
- Ask one student to play the role of an employee who is facing difficult completing a task on time, as he/she needs to early from the store due to a personal emergency.
- Ask the other student to play the role of a colleague who can help him/her achieve his/her targets.
- Provide feedback at the end of the role play.
- Repeat this role play with 2-3 more pair of students.



- Summarise how to build healthy relationships with colleagues.
- Summarise the need to show respect to colleagues and managers.
- Summarise the importance of planning and organising daily work routine.
- Summarise ways to work effectively with co-workers.

# UNIT 13.2: Sharing Information and Making Commitments with Colleagues

## **Unit Objectives**



### At the end of this unit, students will be able to:

- 1. Describe the importance of sharing information with co-workers
- 2. Interpret how to perform task as a team
- 3. Discuss the importance of dress code and personal hygiene in a retail store
- 4. Describe the need to clarify workplace information by asking questions
- 5. Assess how to help colleagues with problems
- 6. Discuss the need to adopt non-discriminatory attitude at workplace

## 13.2.1. Sharing Work-related Information with Colleagues





Ask the students how they will share work-related information with collegues.

## **Explain**



#### Explain some ways to do so:

- Work-related information in a retail store can be shared in the form of files and valuable data.
- This information may include policies on appropriate dress code and employees conduct depending on the level of contact with customers.

# 13.2.2. Interpreting and Performing Task According to Information





Once information is shared with colleagues, it is equally important to interpret and perform tasks as specified under each job responsibility. This can help employees to complete individual and team tasks within given time frame.

# 13.2.3. Understanding the Importance of Dress Code in a Retail Store





Explain common dress code criteria for employees in any business environment:

- All employees, male and female, must wear formal clothing to work for creating and maintaining a positive image in front of customers.
- Formal wear for male employees includes shirt and formal trousers along with well-polished leather shoes.
- Formal wear for female employees includes saree/shirt with formal skirts/shirt with formal trousers and well-polished leather footwear.

## Field Visit



- Conduct a field visit to a nearby retail store.
- Ask students to observe the dress code salespersons follow during the job. Ask them to share their experiences.
- Assist them, whenever required, and resolve their gueries.

## 13.2.4. Understanding Personal Hygiene Procedures



Employees are also expected to understand and follow personal hygiene procedures to create a healthy and safe working environment. This also ensures good health of all employees in the store, which is a critical factor in boosting productivity.

## Tips

### Provide the following tips:

- Always wear clean and tidy clothes
- Use mild perfumes or deodorants to prevent body odour
- Bathe every day
- Wash your hands properly after using the washroom as well as before and after taking meals

## 13.2.5. Passing Important Information to Colleagues



Important information may include information that is extremely critical and confidential for the retail store. Confidential information should always be shared through a secured medium.

## Team Activity 🍱



- Conduct a skill practice team activity.
- Divide the students in teams of 5 students.
- Explain the purpose and duration of the activity:
  - One of the student plays the role of a manager and others of salespersons working in a retail store.

- » Manager has to convey certain information to all. But as he/she is in a hurry he/she gives the information to only one employee and asks him/her to convey the same message to the rest of his/her colleagues.
- » This employee conveys the information to the best of his/her ability but certain misunderstanding occurs due to some communication errors. Find out the problem and solve the same.
- Set guidelines pertaining to discipline and expected tasks.
- Provide the feedback to each team basis the guidelines.

Skill Practice	Time	Resources
Solving Customer Problem	30 mins	Pencil and paper

# 13.2.6. Asking Questions for Clarifying Workplace Information





#### **Explain the following points:**

- All employees in any business, including retail store, must be free to ask questions for clarifying any doubts related to the workplace.
- Free communication is essential for avoiding misunderstandings among workers and ensuring timely delivery of services to customers.

# 13.2.7. Seeking Clarification and Advice from Colleagues or Managers

### **Explain**



#### **Explain the following points:**

- Employees must be open to seek advice and clarifications from colleagues and managers to ensure smooth functioning.
- This not only promotes healthy working relationships among employees, but also ensures delivery of high-quality work on time.

# 13.2.8. Helping Colleagues with Problems to Meet Quality and Time Standards

### **Explain**



#### **Explain the following points:**

 Every organisation should offer proper training to all employees on how to enhance overall productivity of the company. • All team members must be open to helping others on board with problems related to quality and time standards.

### 13.2.9. Prioritising and Completing Task in Time

## **Explain**

#### **Explain the following points:**

- Several people work extremely hard all day, performing jobs that hardly add to their productivity.
- Having huge workload but not feeling productive can be highly frustrating and demotivating for any employee. Hence, every employee must focus on the right goals to meet and improve his/ her productivity with time.

#### Explain the following issues for not fulfilling task requirements:

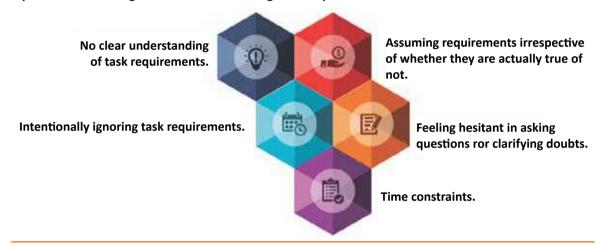


Fig. 13.1 Common Reasons for Not Fulfilling Task Requirements

# 13.2.10. Identifying Work and Personal Priorities to Achieve Balance at Workplace

## Say

- Tasks performed in an organisation can be of different types, such as tedious tasks, unpleasant tasks or high priority tasks which need to be completed before others and within a stipulated time period.
- Unpleasant and tedious tasks usually consume more time, which can have an impact on productivity. Hence, it is important to minimise time spent on tedious tasks by effective time and priority management.

# 13.2.11. Using Questioning Technique to Clarify Instructions and Responsibilities

## Say



#### Two most important strategies involved in the questioning technique are as follows:

- Establish strong communication with the management in order to clarify doubts related to your job responsibilities and goals.
- Be open to post any queries to your manager related to your job.

#### 13.2.12. Making Commitment with Colleagues

## **Explain**



#### **Explain the following points:**

- Practising standard ethics and code of conduct in the store
- Giving topmost priority to customer interest
- · Adhering to various procedures and policies related to the job
- Reporting effectively to managers and maintaining store hierarchy

### 13.2.13. Explaining Reasons for Not Fulfilling a Commitment





#### **Explain the following points:**

Before assigning specific project to an individual or a team, employees should be communicated about prior commitments made by the retail store in relation to these projects/tasks.

# 13.2.14. Non-discriminatory Attitude towards Customers and Colleagues

### Say



In any retail store, it is absolutely critical that employees as well as management adopt a non-discriminatory attitude towards co-workers and customers. They should be treated alike.

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.

### Summarise



- Summarise the importance of sharing information with co-workers.
- Summarise how to perform task as a team.
- Summarise the importance of dress code and personal hygiene in a retail store.
- Summarise the need to clarify workplace information by asking questions.
- Summarise how to help colleagues with problems.
- Summarise the need to adopt non-discriminatory attitude at workplace.

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### **UNIT 13.3: Resolving Conflicts with Colleagues**

### -Unit Objectives 🏻



#### At the end of this unit. students will be able to:

- Discover how to discuss and resolve conflicts in a team
- List the types of misbehaviour in a workplace
- 3. Recognise need to report misbehaviour at the workplace
- 4. List ways to resolve conflicts with colleagues

### 13.3.1. Discussing and Resolving Issues Mutually





Ask the students how they will resolve mutual issues.

### **Explain**



#### **Explain the following points:**

- Handling conflict between employees can be difficult for any business, particularly retail business. While conflicts at workplace are common and unavoidable, they have a negative impact on the company's productivity and employee efficiency.
- In case of conflict between employees, it is advisable to look for ways to settle differences mutually and seek a positive resolution.

### 13.3.2. Reporting Misbehaviour to the Manager





#### Explain the following examples of misbehaviour at a retail store:

- Sexual harassment
- Aggression or violence
- **Bullying**

#### **Explain the following tips:**

- Communicate freely to identify the cause of conflict
- Invite the persons involved in the conflict to present their viewpoint clearly
- Identify and understand consequences of conflict on performance of the whole team
- Differentiate between work and personal priorities and adopt measures to strike a balance between the two

#### **Notes for Facilitation**



- Ask students if they have any questions.
- Explain and reiterate if any student is facing difficulty understanding a concept.
- Optionally, ask any other student to explain the concept in doubt.
- Ask the students if their expectations have been met.
- Ask students to complete the exercise given in their guides.
- Assist them in completing the exercise, if required.

## **Role Play**



- Ask two students to come forward for a role play on how to report misbehaviour to the manager.
- Ask one student to play the role of a trainee associate who has suffered an instance of bullying at work.
- Ask the other student to play the role of the manager.
- Ask the trainee associate to approach the manager and report the incident.
- Provide feedback at the end of the role play.
- Repeat this role play with 2-3 more pair of students.

### **Summarise**



- Summarise how to discuss and resolve conflicts in a team.
- Summarise the types of misbehaviour in a workplace.
- Summarise the need to report misbehaviour at the workplace.
- Summarise ways to resolve conflicts with colleagues.

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# 14. Employability & Entrepreneurship Skills

Unit 14.1 – Personal Strengths & Value Systems

Unit 14.2 - Digital Literacy: A Recap

Unit 14.3 – Money Matters

Unit 14.4 - Preparing for Employment & Self Employment

Unit 14.5 – Understanding Entrepreneurship

Unit 14.6 – Preparing to be an Entrepreneur



### Introduction: Employability and Entrepreneurship Skills

This Facilitator's guide includes various activities which will help you as a facilitator to make the sessions participative and interactive.

#### Ice breaker

• You can begin the module with the following ice breaker:

#### Five of Anything Ice Breaker Steps:

- Divide the participants into groups of four or five by having them number off. (You do this because people generally begin a meeting by sitting with the people they already know best.)
- Tell the newly formed groups that their assignment is to share their five favourite movies of all time, their five favourite novels or their five least liked films. The topic can be five of anything most liked or disliked.
- This ice breaker helps the group explore shared interests more broadly and sparks lots of discussion about why each person likes or dislikes their selected five.
- Tell the groups that one person must take notes and be ready to share the highlights of their group discussion with the class upon completion of the assignment.

#### **Expectation Mapping**

- 1. During the first session and after ice breaker session, ask the participants to answer the following question: "What do I expect to learn from this training?"
- 2. Have one of the participants write their contributions on a flip chart sheet.
- 3. Write down your own list of covered material in the training on another flip chart sheet.
- 4. Compare the two sheets, commenting on what will and what will not be covered during the training.
- 5. Set some ground rules for the training sessions. Ask the participants to put these rules on a flipchart and display it in the class.
- 6. You may get back to those sheets once again at the end of the last session of the training.
- 7. Benefits of doing this activity:
  - Participants feel better as their opinions are heard.
  - Participants get to know what they should expect from the training.
  - The facilitator gets to know which points to emphasize, which to leave out, and which to add during the training.
- 8. Expectations from the participants:
  - Must sign the attendance sheet when they arrive for class.
  - Conduct themselves in a positive manner
  - Be punctual, attentive, and participative
- 9. Explain the contents that are going to get covered one by one and connect it with the expectation mapping done earlier.
- 10. By the end of this exercise, the participants should have a clear understanding of what to expect from the session and what are the areas that will not get covered.

#### **Defining Objectives**

- 1. Defining the objectives in the beginning of the units sets the mood for the unit.
- 2. To begin with the end in mind sets the expectations of the participants as what could be the important takeaways from the session.
- 3. It is also a way of making participants take responsibility of their own learning process.
- 4. For the facilitator, the objectives decide a designed path to progress on so that the learning stays aligned and on track.

- 5. Read the objectives slowly, one by one, and ask the participants to explain what they think it means.
- 6. At the end of the session, you could again revisit the objectives to find out from the participants about how many objectives have been achieved.

#### In order to effectively facilitate this workshop:

- 1. You must have thorough knowledge of the material in the Participant Handbook, and be prepared to answer questions about it.
- 2. You may also wish to read other material to enhance your knowledge of the subject.
- 3. There may be issues raised with which you are not able to deal, either because of lack of time or knowledge. You can either state that you will obtain answers and get back to the participants with the information. Incase the query can be turned to an assignment to the class, do so. You can work with the the participants on the assignment.
- 4. You must have a very clear understanding of what the participants want to accomplish by the end of the workshop and the means to guide the participants.
- 5. As the facilitator, it is your responsibility to make sure that all logistical arrangements are made for the workshop. This may involve doing it yourself or confirming that someone else has made all necessary arrangements associated with the workshop. Assume nothing and check everything before the workshop begins.
- 6. To break the monotony and boredom during sessions, introduce mini breaks in the form of stretching exercises, jokes, some group songs or games.
- 7. Invite discussion from the participants.
- 8. Probe the participants further and lead them to come to affirmative conclusions.
- 9. Let the participants answer. No answer is incorrect.
- 10. Ask one participant to write all the points on the whiteboard.
- 11. Build the sessions from the answers provided by the class.
- 12. Prepare for the sessions in advance so that the resources like flipcharts, handouts, blank sheets of paper, marker pens, etc. can be kept ready.
- 13. Ensure that resources like board, markers, duster etc. is available before your session starts.

#### General instructions for role playing:

- 1. You are not being asked to be an actor or to entertain. The purpose of the role play is to provide a situation in which you can practice certain skills.
- 2. When you read the brief, try to imagine yourself in the situation described and behave in a way you feel to be natural but be conscious of the fact that your role may require a different approach from that which you might normally use.
- 3. You (and others) may benefit from the change in approach and behaviour. Therefore, try to use the approach you feel to be most appropriate for the circumstances described in your brief.
- 4. The brief is just the starting point. It simply sets the scene and the tone of session or activity. Try not to keep referring to the brief as this will affect the spontaneity of the meeting. Allow the role play to develop as you think it might in real life and change your reactions in line with the behaviour and responses of others involved.
- 5. If you find that you have too little information to answer questions or to describe what has happened in the situation, do feel free to add your own thoughts and ideas. Try to keep these within the framework of the role you are taking and try to make your improvisations as realistic as possible.

### UNIT 14.1: Personal Strengths & Value Systems

### **Key Learning Outcomes**



#### At the end of this unit, participants will be able to:

- Explain the meaning of health
- 2. List common health issues
- 3. Discuss tips to prevent common health issues
- 4. Explain the meaning of hygiene
- 5. Discuss the purpose of Swacch Bharat Abhiyan
- 6. Explain the meaning of habit
- 7. Discuss ways to set up a safe work environment
- 8. Discuss critical safety habits to be followed by employees
- 9. Explain the importance of self-analysis
- 10. Discuss motivation with the help of Maslow's Hierarchy of Needs
- 11. Discuss the meaning of achievement motivation
- 12. List the characteristics of entrepreneurs with achievement motivation
- 13. List the different factors that motivate you
- 14. Discuss the role of attitude in self-analysis
- 15. Discuss how to maintain a positive attitude
- 16. List your strengths and weaknesses
- 17. Discuss the qualities of honest people
- 18. Describe the importance of honesty in entrepreneurs
- 19. Discuss the elements of a strong work ethic
- 20. Discuss how to foster a good work ethic
- 21. List the characteristics of highly creative people
- 22. List the characteristics of highly innovative people
- 23. Discuss the benefits of time management
- 24. List the traits of effective time managers
- 25. Describe effective time management technique
- 26. Discuss the importance of anger management
- 27. Describe anger management strategies
- 28. Discuss tips for anger management
- 29. Discuss the causes of stress
- 30. Discuss the symptoms of stress
- 31. Discuss tips for stress management

### UNIT 14.1.1: Health, Habits, Hygiene: What is Health?

### Unit Objectives | @



At the end of this unit, participants will be able to:

- Explain the meaning of health
- List common health issues
- Discuss tips to prevent common health issues
- Explain the meaning of hygiene
- Discuss the purpose of Swachh Bharat Abhiyan
- Explain the meaning of habit

#### Resources to be Used



Participant Handbook

#### Ask



- What do you understand by the term "Health?"
- According to you, who is a healthy person?

### Sav



Discuss the meaning of health and a healthy person as given in the Participant Handbook.

#### Ask



When did you visit the doctor last? Was it for you or for a family member?



- Discuss the common health issues like common cold, allergies etc. Refer to the Participant Handbook.
- Let us do a small activity. I will need some volunteers.

### -Role Play



- Conduct a small skit with volunteers from the class. Consider one of the villagers has been appointed as a health representative of the village, what measures will you as a health representative suggest to the common villagers to prevent common health issues discussed.
- You will need at least 4 volunteers (Narrator, Health Representative, Head of the Village, Doctor).
- Explain the health concerns of the village to the Narrator. The Narrator will brief the class about the skit.
- Give the group of volunteers, 5 minutes to do discuss.
- At the end of 5 minutes, ask the group to present the skit to the class assuming them as the villagers.
- The class can ask questions to the group as a common villager.

### Summarize | **/**



Through this activity we got some tips on how can we prevent these common health issues.



Let us now see how many of these health standards we follow in our daily life.

#### - Activity



Health Standard Checklist from the Participant Handbook.

#### Ask



How many of you think that you are healthy? How many of you follow healthy habits?

### Say



- Let's do an exercise to find out how healthy you are.
- Open your Participant Handbook section 'Health, Habits, Hygiene: What is Health?', and read through the health standards given.
- Tick the points which you think are true for you.
- Try to be as honest as possible as this test is for your own learning.

### Do



- Ensure that all the participants have opened the right page in the Participant Handbook.
- Read aloud the points for the participants and explain if required.
- Give them 5 minutes to do the exercise.
- At the end of 5 minutes, ask the participants to check how many ticks have they got.

#### Summarize |



Tell them that they need to follow all the tips given in this checklist regularly in order to remain healthy and fit.

### Ask



#### **Discuss:**

- Is it necessary to practice personal hygiene every day? Why?
- How does a person feel when they do not practice good personal hygiene? Why?
- Can good personal hygiene help a person feel good about his/her self? How?

### Say



Discuss the meaning of hygiene as given in the Participant Handbook.

#### Activity 2



Health Standard Checklist: Hygiene

### Say



- Let's do an exercise to find out if we maintain good hygiene habits or not.
- Open the Participant Handbook and read through the Health Standard checklist given.
- Tick the points which you think are true for you.
- Try to be as honest as possible as this test is for your own learning.

#### Do



- Ensure that all the participants have opened the right page in the Participant Handbook.
- Read aloud the points for the participants and explain if required.
- Give them 5 minutes to do the exercise...
- At the end of 5 minutes, ask the participants to check how many ticks have they got.
- Ask them to calculate their score.
- Tell them what each score indicates by reading aloud what has been mentioned in the Participant Handbook.

#### Ask



- · How many of you have heard about "Swachh Bharat Abhiyan"?
- Can you tell the class what it is about?

#### Summarize \



• Tell them about Swachh Bharat Abhiyan as given in the Participant Handbook and request them to take a pledge to keep our country clean.

#### Ask



· What is a habit?

### Say



• Discuss some good habits which can become a way of life.

#### Summarize |



• Tell them about good and bad habits and the reasons to make good habits a way of life.

### UNIT 14.1.2: Safety

### Unit Objectives



At the end of this unit, participants will be able to:

- Discuss ways to set up a safe work environment
- Discuss critical safety habits to be followed by employees

#### Resources to be Used



- · Participant Handbook
- Safety signs and symbols
- · Safety equipments
- Blank papers
- Pens

#### Say



- There are many common safety hazards present in most workplaces at one time or another. They include unsafe conditions that can cause injury, illness and death.
- Safety Hazards include:
  - Spills on floors or tripping hazards, such as blocked aisles or cords running across the floor.
  - Working from heights, including ladders, scaffolds, roofs, or any raised work area.
  - Unguarded machinery and moving machinery parts; guards removed or moving parts that a worker can accidentally touch.
  - Electrical hazards like cords, missing ground pins, improper wiring.
  - Machinery-related hazards (lockout/tag out, boiler safety, forklifts, etc.)

### **Team Activity**



#### **Safety Hazards**

- There are two parts to this activity.
- First part will cover the potential safety hazards at work place.
- Second part will cover a few safety signs, symbols and equipments at work place.
- Use this format for the first part of the activity.

	PART 1	
Hazard	What could happen?	How could it be corrected?

### Ask



How could you or your employees get hurt at work?

### Say



• Let's understand it better with the help of an activity. You will be given a handout within your groups. You have to think about the possible hazards of your workplace, what damage these hazards could cause and about the corrective action.

#### Do



- Divide the class into five to six groups of four participants each.
- Put the format on the board for the activity.
- Give blank papers and pens to each group.
- The group is expected to think and discuss the potential safety hazards in the workplace.
- Ask the group to discuss and fill the format using the blank sheet.
- Give the groups 5 minutes for the activity.
- For the second part of the activity, show the class some pictures of safety signs, symbols and equipments.
- Now they will put down a few safety symbols, signs or equipment against the safety hazards identified.
- Give them 5 to 10 minutes to discuss and draw/note it.
- At the end of 10 minutes the groups will present their answers to the class.

### Say



- Now, let's discuss the answers with the class.
- All the groups will briefly present their answers.

### Do



- Ask the audience to applaud for the group presentation.
- Ask de-brief questions to cull out the information from each group.
- Keep a check on time.
- Tell the group to wind up the discussion quickly if they go beyond the given time limit.

#### Ask



#### **De-briefing**

- What did you learn from the exercise?
- As an entrepreneur, is it important to ensure the safety of your employees from possible hazards? Why?

### Summarize 🔎



- Ask the participants what they have learnt so far.
- Ask if they have any questions related to what they have talked about so far.
- Close the discussion by summarizing the tips to design a safe workplace and non-negotiable employee safety habits.

### UNIT 14.1.3: Self Analysis- Attitude, Achievement Motivation: What is Self Analysis?

### - Unit Objectives | 🎯



At the end of this unit, participants will be able to:

- Explain the importance of self- analysis
- · Discuss motivation with the help of Maslow's Hierarchy of Needs
- Discuss the meaning of achievement motivation
- List the characteristics of entrepreneurs with achievement motivation
- List the different factors that motivate you
- Discuss the role of attitude in self- analysis
- Discuss how to maintain a positive attitude
- List your strengths and weaknesses

#### Resources to be Used



- Participant Handbook
- Old newspapers
- Blank papers
- Pencils/ pens

#### **Activity**



This is a paper pencil activity.

What are the three sentences that describe you the best?

What do you need to live happily?

What are your strengths and weaknesses?

#### Do



- Write the three questions on the board/flipchart before the session begins.
- Give plain papers and pencils/pens to each participant.
- Tell participants to write the answer for the three questions on the paper.
- Tell them the purpose of this activity is not to judge anyone but to understand more about self.

#### Say



Discuss the concept of Self Analysis and motivation with reference to Maslow's Hierarchy of Needs as discussed in the Participant Handbook.

### Team Activity



#### **Tower building**

Each group which will create tower using the old newspapers.

### Do



- Divide the class into groups.
- Give them some old newspapers.
- The task is to create a tower out of the newspapers.
- The group which will create the highest tower standing on its own will be considered the winning group.
- Groups can use as many newspapers as they want to and in any way they want.

#### Ask



- · What did the winning group do differently?
- If you were given a chance, how would you have made the tower differently?
- How did you feel while making the tower?
- Did you feel motivated?

### Say



• Discuss the concept of achievement motivation and characteristics of entrepreneurs with achievement motivation as discussed in the Participant Handbook.

#### Ask



• Is your attitude positive or negative?

#### Say



• Let me tell you a story:

#### It's Little Things that Make a Big Difference.

There was a man taking a morning walk at the beach. He saw that along with the morning tide came hundreds of starfish and when the tide receded, they were left behind and with the morning sun rays, they would die. The tide was fresh and the starfish were alive. The man took a few steps, picked one and threw it into the water. He did that repeatedly. Right behind him there was another person who couldn't understand what this man was doing. He caught up with him and asked, "What are you doing? There are hundreds of starfish. How many can you help? What difference does it make?" This man did not reply, took two more steps, picked up another one, threw it into the water, and said, "It makes a difference to this one." What difference are we making? Big or small, it does not matter. If everyone made a small difference, we'd end up with a big difference, wouldn't we?

#### Ask



• What did you learn from this story?

### Activity



#### What Motivates You?

- This is an individual activity.
- It is an exercise given in the Participant Handbook.

### Do



- Ask the class to open their Participant Handbook and complete the exercise given in the section What Motivates You?
- Ensure that the participants have opened the correct page for the activity.
- Give the class 5 minutes to complete the activity.



Discuss the concept of attitude and how to cultivate a positive attitude as discussed in the Participant Handbook.

### Summarize \ \( \beta \)



• Close the discussion by summarizing how self-analysis, knowledge about what motivates you and your positive attitude can help in your business as well in life.

### **UNIT 14.1.4: Honesty & Work Ethics**

### Unit Objectives | @



At the end of this unit, participants will be able to:

- Discuss the qualities of honest people
- Describe the importance of honesty in entrepreneurs
- Discuss the elements of a strong work ethic
- Discuss how to foster a good work ethic

#### Resources to be Used



Participant Handbook

#### Ask



- What do you understand by honesty?
- Why is it important for entrepreneurs to be honest?
- Do you remember any incident where your honesty helped you in gaining confidence?
- Do you remember any incident where someone lost business due to dishonesty?

### Say



- Talk about honesty, qualities of an honest person, and the importance of honesty in entrepreneurs as discussed in the Participant Handbook.
- "Let's understand it better with the help of some case scenarios. You will be given some cases within your groups. You have to analyse the case scenario that has been given to you and then find an appropriate solution to the problem.
- Keep your discussion focussed around the following:
  - What went wrong?
  - · Who was at fault?
  - Whom did it impact- the customer or the businessman?
  - How would it impact the business immediately? What would be the long term impact?
  - What could be done?
  - What did you learn from the exercise?

#### Do



- Divide the class into four groups of maximum six participants depending on the batch size.
- Give one case study to each group.
- Instruct them to read the case carefully.
- Put down the de-brief questions on the board and ask the groups to focus their discussion around these questions.
- The group is expected to analyse and discuss the case amongst them and find a solution to the given problem. Give the class 5-10 minutes to discuss the case and note down their solutions.
- At the end of 10 minutes the team should present their case solution to the class. The presentation can be a
- Ask the group to select a group leader for their group. The group leader to discuss and assign roles to the group members for the presentation.

### Team Activity



#### **Case Study Analysis**

#### Scenario 1

Aakash has a small mobile retail sales and repair shop in Allahabad. He has one of the most popular outlets and has great rapport with his customers.

It's around 11 AM when a customer barges in to the shop and starts shouting at Aakash for giving her a faulty instrument. The screen of her mobile is cracked from one side. Aakash remembered thoroughly checking the handset before handing it over to the customer. The customer threatens to sue him and to go to Consumer Court for cheating her. Now, the problem occurred somewhere outside the shop but as other customers were listening to the conversation, it might impact his business. The situation needs to be managed very sensitively. What would you do if you were in Aakash's place?

#### Scenario 2

Rajni does beautiful Phulkari embroidery on suits and sarees. She has a small home-based business. She has a huge list of customers on Facebook and WhatsApp who give her orders regularly. Smita is one of her old and regular customers. As her sister-in-law's weddingwas around the corner, Smita wanted to buy few handcrafted Phulkari duppatta. She placed an order for three duppattas via WhatsApp and requested Rajni to send them as soon as possible. When the parcel reached Smita through courier she found that out of the three duppatas, only one was hand embroidered and the other two had machine embroidery on them. Even the length and the quality of the material was not as desired. Smita was heartbroken. It was a complete waste of money and moreover she couldn't wear what she had planned to during the wedding functions. She sent a message to Rajni on WhatsApp, expressing her anger and disappointment.

Smita has also sent a feedback and expressed her disappointment on the social media... this will directly affect Rajni's business. What would you do if you were in Rajni's place?

#### Scenario 3

Shankar is a tattoo artist who has a small tattoo showroom in a big, reputed mall in New Delhi. Mr Saksham had an appointment for today, at 11:00 am but he reached at 11:50 am. Meanwhile, Shankar had to reschedule his next appointment. After availing Shankar's services, Mr Saksham started yelling in an abusive language, refusing to pay the requisite amount, and finding faults in the services provided by him. Who was at fault in this case? What should Shankar do? Should he confront Saksham or give in to the demands of the client?

#### Scenario 4

Shailender is an online cloth reseller who does business through social networking sites such as Facebook and WhatsApp. Priyanka made online payment for a dress to Shailander. But she did not receive the dress for a month. When she asked for a cancellation, Shailander started misleading her. For almost 45 days, he kept promising her that he will pay the amount today, tomorrow, day after etc. Even after repeated calls and messages when she did not receive the payment or the dress, she decided to write a post against him on a popular social media platform. As a result, Shailender lost lots of customers and his flourishing business faced a major crisis. How could this situation have been managed?

#### Say



- Now, let's discuss the problem and solution with the larger group.
- The group will first briefly describe the case to the class.
- Then discuss the issue identified and the proposed solution.
- Once the presentation is over, the class can ask their questions.

- Congratulate each group for the group presentation.
- Ask the audience to applaud for them.
- Ask de-brief questions to cull out the information from each group.
- Keep a check on time. Tell the group to wind up the discussion quickly if they go beyond the given time limit.

### Summarize \( \beta \)



- Ask the participants what they have learnt from the exercise/activity.
- Ask if they have any questions related to what they have talked about so far.
- $Close \ the \ discussion \ by \ summarizing \ the \ importance \ of \ honesty \ and \ work \ ethics \ for \ entrepreneurs.$

### UNIT 14.1.5: Creativity and Innovation

### Unit Objectives | @



At the end of this unit, participants will be able to:

- List the characteristics of highly creative people
- List the characteristics of highly innovative people

### Resources to be Used



- Participant Handbook
- Chart papers
- Marker pens

#### · Ask



- You must be aware of the term 'Rags to riches' and heard stories related to the term.
- What do these stories tell us?
- What was so special about these people?

#### Say



- Let's have a look at these stories.
- There are some inspiring stories about people which I would like to share with you.
- Narrate these stories to the class.

#### A.P.J. Abdul Kalam

Who has not heard of A.P.J. Abdul Kalam: Avul Pakir Jainulabdeen Abdul Kalam hailed from a very humble background. His father was a boat owner. To help his family, Kalam would work as a newspaper vendor. With limited resources, he graduated in Physics and studied aerospace engineering. He was instrumental in India's step towards nuclear energy. In 2002, he became the 11th President of India.

#### Water filter/purifier at source

Two young boys studying in classes 4 and 5, from Lingzya Junior High School, Sikkim designed a simple innovative low cost water purifier.

Inspiration behind the idea: Most people today prefer to use a water filter/purifier at their home.

Both the children have given idea to have filter/purifier at the source of water so that everyone has access to clean water without having to make an investment in purchasing a filter/purifier.

Soring's idea is to have a centralised purification system at the point of distribution like water tank while Subash's idea is to have such purifiers attached to public taps.

Source: http://www.rediff.com/getahead/report/achievers-top-31-amazing-innovations-from-youngindians/20151208.htm

#### Solar seeder

This is a story of a innovative solar seeder and developed by Subash Chandra Bose, a class 8, student from St Sebasthiyar Matriculation School, Pudukkottai, Tamil Nadu. Subash has developed a solar powered seed drill, which can undertake plantation for different size of seeds at variable depth and space between two seeds.

Source: http://www.rediff.com/getahead/report/achievers-top-31-amazing-innovations-from-youngindians/20151208.htm

#### Looms for physically challenged

Now this is really inspiring of two sisters, Elakkiya a Class 6 student and Pavithra a Class 9 student of SRC Memorial Matriculation, Erode, Tamil Nadu.

The two sisters have come up with loom for lower limbed physically challenged. In their loom they have replaced the pedal operated system with a motor and a gearbox attached to a pulley mechanism.

Source: <a href="http://www.rediff.com/getahead/report/achievers-top-31-amazing-innovations-from-young-indians/20151208.htm">http://www.rediff.com/getahead/report/achievers-top-31-amazing-innovations-from-young-indians/20151208.htm</a>

#### - Ask



- If they can, why can't you?
- Discuss concepts related to 'Creativity and Innovation' with the participants as given in the Participant Handbook.

### Say



- Recall the stories on motivation.
- What is the inner drive that motivates people to succeed?
- Let's learn more about such creative and innovative entrepreneurs with the help of an activity.

#### Team Activity



- This is a group activity.
  - Think of any one famous entrepreneur and write a few lines about him or her.

#### **Activity De-brief**

- Why did you choose this particular entrepreneur?
- What is his/her brand name?
- What creativity does he/she possess?
- What was innovative about their ideas?

### Do



- Instruct the participants that this is group work.
- Divide the class into small groups of 4 or 6 depending on the batch size.
- Give each group a chart paper.
- Tell the participants they have to write a few lines about any one famous entrepreneur.
- Give the participants 10 minutes to discuss and write.
- Keep a check on time. Tell the group to wind up quickly if they go beyond the given time limit.
- Ask each group to read out what they have written.
- Ask the de-brief questions.

### Summarize /



- Summarize the unit by asking participants if they know of some people who are highly creative and innovative in their approach.
- Ask them to share some experiences about these people with the class.

### Notes for Facilitation



• Source for stories on innovations:

 $\frac{http://www.rediff.com/getahead/report/achievers-top-31-amazing-innovations-from-young-indians/20151208.htm}{}$ 

### UNIT 14.1.6: Time Management

### - Unit Objectives 🏻 🍪



At the end of this unit, participants will be able to:

- Discuss the benefits of time management
- List the traits of effective time managers
- Describe effective time management techniques

#### -Resources to be Used



Participant Handbook

#### Ask



#### Does this sound like you?

- I can never get enough time to finish what I am doing in a day.
- I have so many things to do that I get confused.
- I want to go for a walk and exercise, but I just do not have the time.
- I had so much to do, so I could not deliver that order on time.
- I would love to start my dream business; but, I just do not have the time.

### Example \



• Let's look at these two examples:

#### Example 1:

Ankita works from home as a freelance writer. She says she can easily put in 8 hours of dedicated work in a day. Because she works from home, she saves money on travel and has a comfortable work routine. But there is a challenge and it is distraction. As she works from home, she can easily just get up and sit down on the sofa to watch TV, wasting valuable time. She may have chores to do, errands to run and bills to pay. She ends up working only two to three hours a day and the result is, her work gets piled up. She is unable to take on more work due to this. Even though her quality of work is appreciated her clients are not very happy about the delay in submission.

#### Example 2:

Javed has started a successful online selling company from home and makes a good living from his sales. He has set up a small office space in his living room. As both his parents are working full-time, he also has the role of taking care of his two younger siblings. He almost spends half of his day with the younger kids. He does not mind it but it means taking time away from the work. He is still able to manage his online business with these commitments. He wants to spend some more dedicated hours so as to increase his profits. He also wants to look into new business avenues. What should he be doing.

#### Ask



- Does this happen with you too?
- Do you find it difficult to prioritize your work?
- Are you able to manage your time effectively?

### Activity |



- Conduct a group discussion based on the above examples.
- Direct the discussion on how to prioritize work and manage time effectively.

#### Sav



- Time management is not only about how hard you work but also about how smart you work.
- Discuss "What is Time Management" with the participants as given in the Participant Handbook.

#### Ask



- Why is it important to manage time? How does it help?
- What happens when you don't manage your time effectively?
- Do you find it difficult to prioritize your work?

### Say



- Discuss the benefits of time management given in the Participant Handbook.
- Let's learn effective time management with the help of an activity.

### Activity



#### **Effective Time Management**

• This activity has two parts:

#### PART 1

#### **TO-DO LIST**

- You have to make a to-do list.
- List all of the activities/ tasks that you have to do.
- Try to include everything that takes up your time, however unimportant it may be.
- If they are large tasks, break them into action steps, and write this down with the larger task.
- You can make one list for all your tasks or have separate to-do lists for personal and professional tasks.

#### PART 2

#### **URGENT-IMPORTANT GRID**

- You have to make a grid as shown on the board here. .
- This grid has four boxes. As you can see, each box has a different heading.
- At the heart of the urgent-important grid, are these two questions:
  - Is this task important?
  - Is this task urgent?
- Now, you have to think about each activity that you have written in your to-do list and put it into one of the four categories.
- What do these categories depict?
- Category 1: Urgent/Important
  - This category is for the highest priority tasks. They need to get done now.

#### • Category 2: Not Urgent/Important

- This is where you want to spend most of your time.
- This category allows you to work on something important and have the time to do it properly.
- This will help you produce high quality work in an efficient manner.
- The tasks in this category are probably the most neglected ones, but also the most crucial ones for success.
- The tasks in this category can include strategic thinking, deciding on goals or general direction and planning—all vital parts of running a successful business.

#### Category 3: Urgent/Not Important

- This is where you are busy but not productive. These tasks are often mistaken to be important, when they're most often busywork.
- Urgent but not important tasks are things that prevent you from achieving your goals.
- However, some may be activities that other people want you to do.

#### Category 4: Not Important and Not Urgent

- This category doesn't really include tasks, but rather habits that provide comfort, and a refuge from being disciplined and rigorous with your time management.
- Some may be activities that other people want you to do.
- These might include unplanned leisure activities as well.

#### **TO- DO list format**

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	

#### **URGENT-IMPORTANT GRID**

#### **URGENT/ IMPORTANT**

- Meetings
- Last minute demands
- Project deadlines
- Crisis

#### **NOT URGENT/ IMPORTANT**

- Planning
- Working towards goals
- Building relationship
- Personal commitments

1

} |

- Interruptions
- Phone calls/ E-mails
- Other people's minor demands

#### **URGENT/ NOT IMPORTANT**

- Internet surfing
- Social media
- Watching TV

**NOT URGENT/ NOT IMPORTANT** 

#### **URGENT/ IMPORTANT GRID format**

1 2
3 4
URGENT/ NOT IMPORTANT
NOT URGENT/ IMPORTANT

## Do 🗸

- Put down the formats for the to-do list and the urgent/important grid on the board.
- Instruct the participants to prepare their to-do list first.
- Give the participants 10 minutes to prepare the list.
- Once done, instruct them to divide the tasks in to-do list into the four categories.
- Explain the four categories to the participants giving examples specific to their context.
- As you explain the categories fill the grid with the type of tasks.
- Give the participants 40 minutes to fill the grid.
- Then explain how to balance the tasks between the four categories.
- Keep a check on time. Tell the group to wind up quickly if they go beyond the given time limit.

#### Say



#### **Activity De-brief:**

How can we balance tasks between the four categories?

How to manage time through this grid?

- Category 1: Urgent/Important
  - Try to keep as few tasks as possible here, with the aim to eliminate.
  - If you spend too much of your time in this category, you are working solely as a trouble shooter, and never finding time to work on longer-term plans.
- Category 2: Not Urgent/Important
  - Plan these tasks carefully and efficiently as they are most crucial ones for success.
  - If necessary, also plan where you will do these tasks, so that you're free from interruptions.
  - Include strategic thinking, deciding on goals or general direction and planning in your planning process.
- Category 3: Urgent/Not Important
  - Ask yourself whether you can reschedule or delegate them.
  - A common source of such activities is other people. Sometimes it's appropriate to say "no" to people politely, or to encourage them to solve the problem themselves.

#### Category 4: Not Important and Not Urgent

- You also want to minimize the tasks that you have in this category.
- These activities are just a distraction avoid them if possible.
- You can simply ignore or cancel many of them.
- Politely say "no" to work assigned by others, if you can, and explain why you cannot do it.
- Schedule your leisure activities carefully so that they don't have an impact on other important tasks.
- Discuss the traits of effective time managers and effective time management techniques as given in the Participant Handbook.

#### Summarize



• Discuss the traits of effective time managers and effective time management techniques as given in the Participant Handbook.

#### **Notes for Facilitation**



- Here is a short story. You can conclude the session narrating the story. To make it more interesting you can perform the demonstration described and discuss the short story.
  - One day an expert in time management was speaking to a group of students. As he stood in front of the group, he pulled out a large wide-mouthed glass jar and set it on the table in front of him. Then he took out a bag of about a dozen rocks and placed them, one at a time, into the jar. When the jar was filled to the top and no more rocks would fit inside, he asked, "Is this jar full?" Everyone in the class said, "Yes." Then he said, "Really?"
  - He reached under the table and pulled out a bucket of gravel (small stones). He dumped some gravel in and shook the jar causing pieces of gravel to work themselves down into the space between the rocks. Then he asked the group once more, "Is the jar full?" By this time, the class began to understand. "Probably not," one of them answered. "Good!" he replied.
  - He reached under the table and brought out a bucket of sand. He started dumping the sand in the jar and it went into all of the spaces left between the rocks and the gravel. Once more he asked the question, "Is this jar full?" No!" the class shouted. Once again he said, "Good." Then he grabbed a jug of water and began to pour it in until the jar was filled to the brim. Then he looked at the class and asked, "What is the point of this illustration? "One student raised his hand and said, "No matter how full your schedule is, if you try really hard you can always fit some more things in it!" "No," the speaker replied, "that's not the point. The truth this illustration teaches us is: If you don't put the big rocks in first, you'll never get them in at all." What are the 'big rocks' in your life? Your children; your loved ones; your education; your dreams; a worthy cause; teaching or mentoring others; doing things that you love; time for yourself; your health; your mate (or significant other). Remember to put these BIG ROCKS in first or you'll never get them in at all. If you sweat about the little stuff (the gravel, sand, and water) then you'll fill your life with little things you worry about that don't really matter, and you'll never have the time you need to spend on the big, important stuff (the big rocks).
- End the story with these lines...

So, tonight, or in the morning tomorrow, when you are reflecting on this short story, ask yourself this question: What are the 'big rocks' in my life? Then, put those in your jar first

### UNIT 14.1.7: Anger Management

### Unit Objectives | @



At the end of this unit, participants will be able to:

- Discuss the importance of anger management
- Describe anger management strategies
- Discuss tips for anger management

#### -Resources to be Used



Participant Handbook

#### Ask



- What is anger? Is anger good or bad?
- Is anger normal or an abnormal behaviour? How can anger harm you?
- Why is it important for entrepreneurs to manage their anger?



- Talk about anger and the importance of anger management in entrepreneurs as discussed in the Participant Handbook.
- Let us do a small activity. This is an individual activity.
- Think of the incidents and situations that angered you and hurt you.

#### Do



- Instruct them to note down these situations under different categories (as given in the Activity).
- Give the class 3-5 minutes to think and note down their answers.
- At the end of 5 minutes, ask some participants to volunteer and present their answers.
- They can also share these situations with their fellow participants if they do not wish to share it with the entire class.

### - Activity



- Do you remember any incident which has hurt
  - you physically
  - you mentally
  - your career
  - your relationships.

#### Ask



- Do you ever get angry?
- What are the things that make you angry?
- Do you remember any incident where your anger management helped you in maintaining healthy relationship?
- Do you remember any incident where someone lost business/friend/relationship due to temper (anger)?



- · There are a few strategies which can help in controlling your anger. Let's do an activity to understand the anger management process better.
- This is an individual activity.
- Think of the incidents/situations which trigger your anger (the cause).
- Then think what happened as a result of your anger (the effect).
- You need to come up with some techniques to manage your anger.

#### Do



- Give the class the anger triggers (the cause) as listed in the activity.
- Put down the activity format (Anger Triggers, Result of your Anger, Anger Management Techniques) on the board and instruct the class to write the answers under different categories.
- Give the class 3-5 minutes to think and note down their answers.
- At the end of 5 minutes, ask the participants who wish to volunteer and present their answers.

#### Activity / 1999



Trigger points and Anger Management Techniques Activity

#### **Anger Triggers**

List of triggers that make you angry:

Someone says you did something wrong.

You want something you can't have now.

You get caught doing something you shouldn't have been doing.

You are accused of doing something you didn't do.

You are told that you can't do something.

Someone doesn't agree with you.

Someone doesn't do what you tell him to do.

Someone unexpected happens that messes up your schedule.

#### Result of your anger:

Write the techniques that you use to manage your anger:

Anger Management Techniques

### Say



- Now, let's discuss the problems and solution with all.
- The individual will first briefly describe trigger points to the class.
- Then discuss the result of the anger. Other participants are requested to remain quiet while one is making the presentation.
- Post presentation, other participants may ask questions.

### Do



- Congratulate each individual for sharing their points.
- Ask the audience to applaud for them.
- Ask de-brief questions after the presentation to the class.
- Keep a check on the time. Ask the participants to wind up the activity quickly if they go beyond the given time limit.

#### Ask



#### **De-brief questions:**

- In the situation described by the presenter, who was at fault?
- How could you have handled this situation alternatively?

### Summarize | 2



- Close the discussion by summarizing the strategies and tips of anger management for entrepreneurs.
- Ask the participants what have they learnt from this exercise/activity.
- Ask if they have any questions related to what they have talked about so far.

### - Notes for Facilitation



- Encourage the participants to share information about them while presenting the situations to the class.
- Keep the format of the Activity prepared in a chart paper so that it can be displayed during the session.

### UNIT 14.1.8: Stress Management: What is stress?

### Unit Objectives | @



At the end of this unit, participants will be able to:

- Discuss the causes of stress
- Discuss the symptoms of stress
- Discuss tips for stress management

#### Resources to be Used



Participant Handbook

#### Ask



- You are waiting in the reception for an interview or a very important meeting, suddenly your legs are shaky, your hands are cold, you are feeling nervous. Have you ever been in this kind of situation?
- Have you had days when you had trouble sleeping?
- Have you ever been so worried about something that you ended up with a terrible headache?

#### Sav



You've probably heard people say, I'm really stressed out" or "This is making me totally stressed."

#### Ask



- What do you understand by stress?
- What gives you stress?
- How do you feel when you are stressed or what are the symptoms of stress?
- How can stress harm you?
- Why is it important for entrepreneurs to manage stress?

### Say



- When we feel overloaded or unsure of our ability to deal with certain challenges, we feel stressed.
- Discuss about stress, causes of stress, and symptoms of stress as discussed in the Participant Handbook.
- Let's understand the causes of stress and how to deal with them with the help of some case scenarios.
- You will be given some cases.
- You have to analyse the case scenario and then find an appropriate solution to the problem.
- This will be a group activity.

#### Do



- Divide the class into four groups of 5-6 participants (depending on the batch size).
- Assign one case scenario to each group.
- Instruct them to read the case carefully.
- The group is expected to analyse and discuss the case amongst them and find a solution to the given problem.
- Explain their discussion should result in getting answers for the following questions:

- What was/ were the cause(s) of stress?
- Was the stress avoidable or manageable under the given circumstances?
- If yes, how do you think that the stress could be avoided (managed)?
- If no, then why not?
- Give the class 10-12 minutes to discuss the case and note down their solutions.
- At the end of 12 minutes, the team should present their case solution to the larger group.
- Ask the group to select a group leader for their group.
- The group leader to discuss and assign roles to the group members for the presentation.

### Team Activity



### **Case Study Analysis**

### Scenario 1

Akash's alarm doesn't go off and he gets late getting out of the house. He hits traffic and ends up 15 minutes late to work, which his boss notices. He gets to his desk and finds he has to complete 2 reports in next one hour. Just when he is about to begin work, a message pops up "Telecon with the client begins in 10 minutes. Please be in the conference room in 5 minutes."

His is not prepared for the call. He is stressed. He does not want to speak to his boss about this. He is stressed, feeling uncomfortable and sick. Not in a position to attend the call or finish the reports on time.

#### Scenario 2

While paying his overdue bills, Rahul realised that it's the middle of the month and he has only Rs 500 left in his account. He has already asked all of his friends, and family for loans, which he hasn't paid back yet. He is still contemplating over the issue when his phone rings. His sister's birthday is due next week and she has seen a beautiful dress which she wants to buy but cannot tell the parents as it is a bit expensive. She wishes if Rahul could buy the dress for her. Rahul has promised to buy her the dress for her birthday.

Rahul is stressed, does not understand what to do. He is unable to concentrate on his work and unable to complete the tasks assigned. His team leader has already warned him of the delay.

### Scenario 3

Sheela calls the cable company as she has unknown charges on her bill. She has to go through the automated voice mail menu three times and still can't get through to a customer care executive. After 15 minutes of repeated efforts, her call is answered. She explains the entire issue to the customer care executive but before the person could suggest a way out, the call drops.

Now Sheela has to call back and repeat the whole process all over again with a new customer care executive. She is very angry and calls again but cannot connect this time.

She has to leave to office so she decides to call from office and check. When she connects this time she is angry and argues with the executive on the call. All her co-workers around are looking at her as her volume has suddenly increased. She bangs the phone and ends the call.

Her co-worker Neelam enquires what has happened to her. She ignores her and just walks off. She has become irritable and her behaviour and tone with other co-workers is not acceptable.

#### Scenario 4

Arpit is a young entrepreneur who started doing business through Facebook few weeks back. He had always been into a job. Although Arpit has very few financial liabilities, it wasn't an easy decision to leave a comfortable job at once and look for newer pastures. Arpit's boss warned him of the consequences and the challenges of starting a business when nobody ever in his family had been in business.

He has not been able to get a good deal till now. This is an important life shift for him which comes with unknown variables. Arpit is nervous and is wondering if he has what it takes to fulfill the requirement of his new role, or the new experiences he's likely to face.

### Ask



### **De-brief questions:**

- What was/ were the cause(s) of stress?
- Was the stress avoidable or manageable under the given circumstances?
- If yes, how do you think that the stress could be avoided (managed)?
- If no, then why not?

### Say



- Now, let's discuss the problem and solution with the larger group.
- The group will first briefly describe the case to the class.
- Then discuss the issue identified and the proposed solution.
- Post presentation, the other groups may ask questions to the group that has presented.

### Do



- Congratulate each group for sharing their points.
- Ask the audience to applaud for them.
- Ask de-brief questions to cull out the information from each group.
- Keep a check on time. Tell participants to wind up the discussion quickly if they go beyond the given time limit.

### Say



- While it is common and normal to feel some tension. This feeling nervous and tensed can interfere with your thinking process and can have a negative impact on your performance.
- Stress can deplete the most vibrant of souls. It can have a negative effect on every aspect of a person's life including their health, emotional well-being, relationships, and career. However, one needs to understand the causes and types of stress before looking for ways to manage it.

### De-brief:

### Scenario 1

The cause of stress was lack of time management and the habit of procrastinating. If Akash would have managed his time well, planned alternate ways to get up on time, finished prior tasks on time and planned for client meetings in advance then he wouldn't have faced stress.

#### Scenario 2

The cause of stress was lack of financial planning. Rahul should have planned his financial resources well in advance and saved some money for the rainy day. Also, differentiating between needs and wants and keeping a check on non-essential expenditure would have saved Rahul from this situation.

#### Scenario 3

Sometimes, stress is caused due to external factors instead of internal ones. In this case, the stress was unavoidable because we have no control over this customer care system. Every time, you will get in touch with a new executive and will have to explain all over again. This might cause stress but despite being frustrated and angry there is little that we can do about it. All Sheela could do was to find ways to calm herself down through some breathing exercises and meditation, reading some good book or listening to music and then start afresh.

#### Scenario 4

A positive, major life change can be a source of good stress. Regardless of how good the change is, it can be stressful. Stress caused by a positive and major life change can be beneficial because it causes a person to step out of their comfort zone and learn new skills. Here, Arpit may become a successful entrepreneur or learn new ways to do things differently.

Now let us see this scenario, can I have a volunteer to read out this case to the class.

### Do



• Ask one of the participant who can volunteer and read out this scenario to the class.

#### Scenario 5

Rakesh lives in Kathmandu with his wife and two beautiful daughters Sarah and Sanya. Nepal was hit by a massive earthquake and Rakesh's building collapsed during the earthquake. During evacuation, Rakesh realised that though his wife and Sarah were fine and suffered only minor bruises, Sanya was nowhere in the scene. Panic stricken, he started calling her name and searching her frantically. A little later, he heard a meek voice from beneath the debris. He quickly removed the rubble to find a huge bed. Rakesh was pretty sure that Sanya was trapped underneath. Though he was badly bruised, he gathered all his courage and with all his might, he lifted the several-ton bed to save Sanya's life. Everyone was relieved to see Sanya alive and also extremely surprised to see this father's ability to access superhuman strength.

- Ask the audience to applaud for the participant after the scenario is read completely.
- Discuss the scenario, ask de-brief questions:
  - What kind of stress was Rakesh undergoing in this case?
  - Was the stress avoidable or manageable under the given circumstances?
  - What was the result of the stress?

### Say



#### De-brief:

Not all stress is harmful; good stress is actually energizing. This was a case of lifesaving stress, or hero stress,
which is an important example of good stress. You may have heard stories in which a person performs an
impossible feat of physical strength in order to save their life or the life of someone they love. This type of
stress causing a surge of adrenaline is good for us.

# Summarize 📜

- Close the discussion by summarizing the tips to manage stress as given in the Participant Handbook.
- Ask the participants what they have learnt from this exercise/ activity.
- Ask if they have any questions related to what they have talked about so far.

### Notes for Facilitation



- Keep printed copies of the activities/scenarios ready for the session.
- Put down the de-brief questions on a flip chart so that it can be displayed in the class during the activity.
- Encourage participation and make the discussions interative.

Notes			
Notes 🔳			



# UNIT 14.2: Digital Literacy: A Recap

# **Key Learning Outcomes**



### At the end of this unit, participants will be able to:

- 1. Identify the basic parts of a computer
- 2. Identify the basic parts of a keyboard
- 3. Recall basic computer terminology
- 4. Recall the functions of basic computer keys
- 5. Discuss the main applications of MS Office
- 6. Discuss the benefits of Microsoft Outlook
- 7. Identify different types of e-commerce
- 8. List the benefits of e-commerce for retailers and customers
- 9. Discuss Digital India campaign will help boost e-commerce in India
- 10. Describe how you will sell a product or service on an e-commerce platform

# UNIT 14.2.1: Computer and Internet Basics: **Basic Parts of a Computer**

## -Unit Objectives 🏻 🎯



At the end of this unit, participants will be able to:

- Identify the basic parts of a computer
- Identify the basic parts of a keyboard
- Recall basic computer terminology
- Recall the functions of basic computer keys

### Resources to be Used



- Participant Handbook
- Computer Systems with the required applications

### Sav



- Let's take a quick recap of the basic computer parts.
- Discuss 'Basic Parts of Computer' and 'Basic Parts of a Keyboard' with the class as given in the Participant Handbook.

## **Explain**



Explain all the parts of the computer and the keyboard by demonstrating on the real system.

### Ask



- Do you know about internet?
- Have you ever used internet?
- Why do you think internet is useful?
- What was the last task you performed on internet?

### Say



- Let's look at some basic internet terms.
- Discuss 'Basic Internet Terms' with the participants as given in the Participant Handbook.

### Summarize |



- Ask the participants what they have learnt from this exercise/ activity.
- Ask if they have any questions related to what they have talked about so far.
- Close the discussion by summarizing the importance of computer and internet for entrepreneurs.

# Practical |

- Conduct a practical session.
- Ask the participants to assemble in the computer lab.
- Give some hands on practice exercises.

# Do 🗸

- Group the participants for the activity depending on the batch size and the number of computer systems available in the lab.
- Explain the purpose and duration of the activity.
- Ensure the participants complete the practical exercises assigned.

### UNIT 14.2.2: MS Office and Email: About MS Office

## Unit Objectives | @



At the end of this unit, participants will be able to:

- Discuss the main applications of MS Office
- Discuss the benefits of Microsoft Outlook

### Resources to be Used



- Participant Handbook
- Computer Systems with MS Office

### Ask



- What is the most frequent activity that you do on the computer?
- Do you know how to make presentations on the computer?



- Give a brief introduction of MS Office as given in the Participant Handbook.
- Discuss the most popular office products. Explain in brief their application, benefits and working.
- Microsoft Word is a word processing program that allows for the creation of documents. The program is equipped with templates for quick formatting. There are also features that allow you to add graphics, tables, etc.
- Microsoft Excel is a tool for accounting and managing large sets of data. It can also simplify analysing data. It is also used to create charts based from data, and perform complex calculations. A Cell is an individual data box which will have a corresponding Column and Row heading. This gives the cell a name, referred to as the Cell Reference. There can be multiple pages in each workbook. Each page, or sheet, is called a Worksheet. When you open a new Excel file, it automatically starts you with three worksheets, but you can add more.

### -Explain



Explain the working and frequently used features of Office on a real system.

### Ask



- What do you know about e-mails?
- Do you have an email id?
- How often do you check your e-mails?

### Sav



- Communication is vital for every business. The fastest and the safest way to communicate these days are through emails. MS Outlook helps to manage your emails in a better way and also offers a host of other benefits.
- Discuss "Why Choose Microsoft Outlook?" with the participants as given in the Participant Handbook.

- Ask the participants to assemble in the computer lab.
- Explain the working of Outlook on a real system..

# Demonstrate |



- Demonstrate how to create email id.
- Demonstrate how to write new mails, send mails.
- Demonstrate how to use MS Office application to create a letter and send it as attachment in an email.
- Demonstrate how to use other MS Office applications.

## -Practical | 💥



- Give some hands on practice exercises
- Group the participants for the activity depending on the batch size and the number of computer systems available in the lab.
- Explain the purpose and duration of the activity.

### -Summarize



- Ask the participants what they have learnt from this exercise/activity.
- Ask if they have any questions related to what they have talked about so far.

### UNIT 14.2.3: E-Commerce

## -Unit Objectives | 🎯



At the end of this unit, participants will be able to:

- Identify different types of e-commerce
- List the benefits of e-commerce for retailers and customers
- Discuss Digital India campaign will help boost e-commerce in India
- Describe how you will sell a product or service on an e-commerce platform

### Resources to be Used



- Computer System with internet connection
- Participant Handbook

### -Ask



- How many of you have done shopping online?
- Can you name at least five shopping websites?
- What is the product that you most frequently buy online?
- Why do you do shopping online instead of going to the market?

### Say



- Give a brief introduction of "What is E-commerce". Refer to the Participant Handbook.
- E- commerce emerged in the early 1990s, and its use has increased at a rapid rate. Today, many companies sell their products online. Everything from food, clothes, entertainment, furnitureand many other items can be purchased online.

### -Ask



What other types of transactions have you performed on the internet other than buying products?



• Give examples of e-commerce activities from Participant Handbook.

### **Team Activity**



#### **E-commerce examples**

- Instruct the participants to list some of the payment gateways that they have used for e-commerce activities.
- Give them 5 minutes to make this list.
- Discuss payment gateways and transaction through payment gateways.
- Conclude the discussion by mentioning how important e-commerce has become in our day to day transactions.



- E-commerce activities can be classified based on the types of participants in the transaction.
- Discuss "Types of E-commerce" from the Participant Handbook.

## -Do



- Discuss all types of E-commerce by giving examples and names of some popular websites which use them.
- Make the discussion interactive by asking the class to share some popular e-commerce sites of each type.

### ·Sav



- E-commerce activities bring a host of benefits for both, retailers and customers.
- Discuss benefits of E-commerce from the Participant Handbook.

### -Explain



- The majority of the population that uses E-commerce activities lives in tier-1 and tier-2 cities. To encourage the use of digital money in tier-3 and 4 areas, PM Mr. Modi launched the "Digital India Campaign".
- Discuss "Digital India Campaign" from the Participant Handbook.
- By Digital India project the government will deliver services via mobile connectivity and in doing so, is expected to bring the internet and broadband to remote corners of the country. This connectivity will in turn enhance e-commerce activities also. Furthermore, the Indian Government is also modernizing India Post and aims to develop it as a distribution channel for e-commerce related services.



- Now let us discuss how to sell a product using E-commerce.
- Every product has to be sold on a platform on the internet. Think of it as a shop that you have to sell your product. Now this shop can be your own or shared or rented. If the shop is your own or rented there will be only your products in that shop. If the shop is shared, there will be products of multiple sellers in that shop. A common example is a departmental store which has products from multiple brands in the shop.
- Similarly, in E-commerce the shop is the website where your products are displayed. If it is your own website it will exclusively showcase your products. In this case the cost that you will incur will be:
  - Developing the website
  - Hosting the website
  - Maintenance of the website
- If you rent a website it will also showcase your own products but the development, hosting and maintenance parts goes to the owner. This saves time and the cost to manage these activities.
- Smaller companies usually go for renting a website and the bigger ones develop their own website.
- The concept of shared platforms has become very popular in recent times. In this platform the sellers have to register and then they can sell their goods on a common platform. Among the most popular of these are Amazon, Myntra, Flipkart, etc.

## -Role Play



- Tell the participants to choose a product or service that they want to sell online.
- Tell them to write a brief note explaining how they will use existing e-commerce platforms, or create a new ecommerce platform to sell their product or service.

### Ask



- How much money are you carrying in your wallet?
- Do you have a credit/debit card?
- How do you make payments while doing online shopping?

### Say



- Demonetization has made carrying cash in the wallet very difficult. People either shop through cards or some other form of digital money.
- So what do you think is digital money?
- In this form the money is both paid and received digitally. There is no hard cash involved. It is an instant and convenient way to make payments.
- There are various types of digital payments. Let us discuss some of them in brief here.
- The first one is the most commonly used system i.e. the cards. Debit card, credit card, prepaid card, all fall under this category.
- Then is the e-wallet or the mobile wallet. This has become the most used form of digital money after demonetization. Examples are Paytm, state bank buddy, Freecharge, etc.
- Many other forms of digital money are also coming up in market like mobile apps, Aadhar card based payment, etc.

## Do



• Demonstrate how to make and receive payments through digital models like Paytm and state bank buddy.

### -Ask



 Why do you think people have started using digital money instead of hard cash? Is demonetization the only reason?

### Say



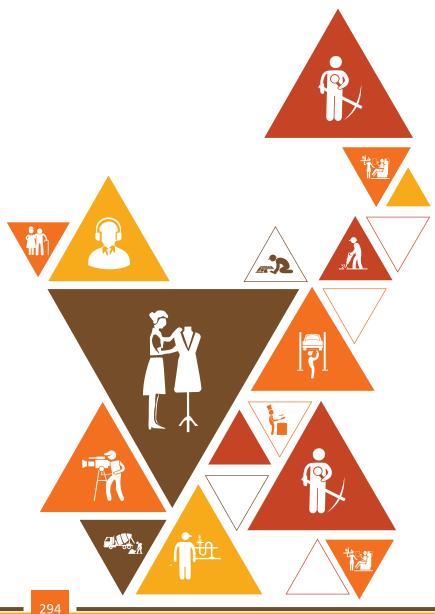
- Digital money gives a lot of advantages over the conventional hard cash. Some of them are:
  - Digital payments are easy and convenient. You do not need to take loads of cash with you, a mobile phone or a card will suffice.
  - With digital payment modes, you can pay from anywhere anytime.
  - Digital payments have less risk.

### Summarize |



- Ask the participants what they have learnt from this exercise/ activity.
- Ask if they have any questions related to what they have talked about so far.
- Close the discussion by summarizing the importance of e-commerce and digital money.

Notes 📋 —		



# **UNIT 14.3: Money Matters**

# **Key Learning Outcomes**



At the end of this unit, participants will be able to:

- 1. Discuss the importance of saving money
- 2. Discuss the benefits of saving money
- 3. Discuss the main types of bank accounts
- 4. Describe the process of opening a bank account
- 5. Differentiate between fixed and variable costs
- 6. Describe the main types of investment options
- 7. Describe the different types of insurance products
- 8. Describe the different types of taxes
- 9. Discuss the uses of online banking
- 10. Discuss the main types of electronic funds transfer

### UNIT 14.3.1: Personal Finance – Why to Save?

## -Unit Objectives 🏻 🎯



At the end of this unit, participants will be able to:

- Discuss the importance of saving money
- Discuss the benefits of saving money

### Resources to be Used



Participant Handbook

### Ask



- How many of you save money?
- Why do you feel the need to save it?
- Do you plan your savings?
- Where do you keep the money you save?
- How do you use the money that you have saved?

## -Example



Let's look at these two examples:

### Example 1:

Suhani works in a good company and earns Rs.30, 000 month. She always saves 5000 per month and keeps it aside as a personal saving. She keeps the money at home and has saved quite a lot. One day her mother has a medical emergency and has to be taken to the hospital. Her family is worried about the amount they have to spend for the treatment. It will cost them at least 40,000.

Suhani says tells her family not to worry and that she has about 50,000, which she has saved over the months.

### Example 2:

Jasmeet works in the same company and earns the same as Suhani. She is very fond of shopping and spends most of her money on buying new clothes. At the end of the month, she is always asking her father for money as her pay is finished.

### Ask



- Who do you identify with -Suhani or Jasmeet?
- How do you think Suhani manages to save money which Jasmeet is unable to do?



- We should always set aside some and save some money from our monthly pay. The future is unpredictable. Saving money not only gives you a sense of financial security but it can be used in case of emergencies.
- Discuss "Importance of Saving" with the participants as given in the Participant Handbook.

### -Ask



- What are the benefits of saving money?
- What does being financially independent mean to you?

### Say



- Discuss "Benefits of Saving" with the participants as given in the Participant Handbook.
- Now let us continue with Suhani's story. Suhani has told her family not to worry and that she has about 50,000, which she has saved over the months. The family is happy about Suhani's decision of saving money, which will be of great help for them now.

Suhani is going to the hospital today to pay the first instalment for the treatment. Suddenly finds only 35,000 in her cash box when she counts and does not remember using it. She has not kept any record and now she is upset.

### Ask



- Was it a good decision by Suhani to save a part of her earnings every month?
- Was it a wise decision to keep all her savings as cash in a cash box?
- Could she have managed to save money in a better and more effective manner?
- Do you want to learn how to save money and use it effectively?

### Say



• Let's learn personal saving with the help of a group activity.

### Team Activity



### Personal Finance-Why to save

This activity has two parts:

#### PART 1

#### **WAYS TO SAVE MONEY**

- You are earning 30,000/- per month. You have recently changed your job and have to move to a metropolitan city. You are now living as a paying guest paying 10,000/- per month. Your other estimated expenditures like travel, food, recreation would be around Rs. 17,000 per month.
- Make a list of different ways to save money.

#### PART 2

#### **HOW WILL YOU USE THE MONEY**

- After a year how much have you been able to save?
- How will you use the money that you have saved?

### Do



- Divide the class into groups of four.
- Instruct the participants to think and prepare a list of the various ways they can save money.
- Give the participants 10 minutes to prepare the list.
- Once done, instruct them to think of how they could use the money they have saved.
- Give the participants 10 minutes to prepare the list.
- Keep a check on time. Tell the group to wind up quickly if they go beyond the given time limit.

#### **Activity De-brief**

- What were the different ways you could save money?
- How much money were you able to save?
- How will you use the money you have saved in one year?

### Say



• Discuss the importance of personal finance and why it is important to save money.

# -Summarize



### $You \, can \, summarize \, the \, session \, by \, discussing: \,$

- The importance of saving money.
- Ways to save money.
- How the money saved can be used for different purposes.

## UNIT 14.3.2: Types of Bank Accounts, Opening a Bank Account

## -Unit Objectives 🏻 🍪



At the end of this unit, participants will be able to:

- Discuss the main types of bank accounts
- Describe the process of opening a bank account

### Resources to be Used



- Account opening sample forms
- Participant Handbook

### Ask



- How many of you save money?
- Where do you keep the money you save?
- How many of you have a bank account?
- What type of account do you have?

## -Example



• Let's look at the given example:

Reena is in the third year of college but in the evening she gives tuitions for children living in her colony. She earns 15,000/- per month. As her students stay in different parts of the city, she has to walk a lot.

To save time, she decides to buy a second hand scooter for herself. But she has to save money for it. Her class mate advises her to open a recurring deposit account in the bank.

She goes to the bank close to her home. The personal manager gives her some forms to fill. She is confused as she has never done this before. Her elder sister has an account in the same bank. She asks for help from her sister. She goes to the bank the next day with her sister. The personal banker gives her a list of documents that she will need to submit with the form for opening an account. The banker advises her to open a 6 months recurring deposit.

### -Ask



- Do you try to save money monthly but have to spend it on unforeseen expenditure?
- Have you ever thought of depositing your savings in a bank?

### Say



- Before opening a bank account, you need to know the types of accounts we have in India.
- Discuss "Types of Bank Accounts" with the participants as given in the Participant Handbook.

### -Ask



Can someone say what are the different types of bank accounts?

### Say



• Let's learn about the different types of bank accounts through an activity.

### Team Activity 💃



- Divide the class in four groups.
- Label the groups as savings account, current account, recurring account and fixed deposit.
- On a chart paper, ask them to write the key points of their account.

### **Activity De-brief**

• Ask each group to present the key points of their account.

### -Say



- Now that you know about the four different types of accounts, let's learn how to open a bank account.
- Discuss "Opening a Bank Account" with the participants as given in the Participant Handbook.
- Discuss "Tips" that the participants should keep in mind while opening a bank account as given in the Participant Handbook.

### -Ask



- What are the main documents required for opening a bank account?
- What are some important points to ask the bank personnel while opening an account?

### Say



- Mention officially valid KYC documents (refer to the Participant Handbook)
- Now, let's understand the procedure of opening a bank account through an activity.

### Team Activity



#### **Opening a Bank Account**

- This activity is done in groups.
- Divide the class in groups of four or six.

#### PART 1

#### FILLING A BANK ACCOUNT OPENING FORM

- You have to fill a bank opening form.
- You can refer to the section "Opening a Bank Account" of your Handbook for reference.
- List all the steps that you will be required to fill in the form.
- List the documents that you needs for filling the form.
- Now fill in the form.

#### **Activity De-brief**

#### How did you design the form?

- What all details did you fill in the form?
- What were your KYC documents?
- How would this activity help you in future?

# Do

- Instruct the participants to read the section "Opening a Bank Account' of the Participant Handbook.
- Give each group one sample account opening form.
- Give the participants 5 minutes to read the form.
- Give them 15 minutes to fill it.
- Assist them by explaining each category and how to fill it.
- Keep a check on time.
- Tell the group to wind up quickly if they go beyond the given time limit.

### -Summarize 📜

Annual Income No. of Dependents



### Note:

- You can summarize the unit through a role play.
  - A person wanting to open an account in the bank.
  - What is the procedure that he will go through?
  - Discuss the key points of different types of bank accounts.
  - How to select the type of account
  - How to fill the account opening form.
- A sample account opening form is given in the following page for reference. Use it for the activity in the class.

Sample Bank Account Opening	g form.		
Photograph			XXX Bank
	SAVING BANK AC	CCOUNT OPENING F	ORM
Account No.:			Date:
Name of the Branch			
Village/Town			
Sub District / Block Name			
District			
State			
SSA Code / Ward No.			
Village Code / Town Code		Name of Village /	Town
Applicant Details:			
Full Name Mr./Mrs./Ms.	First	Middle	Last Name
Marital Status			
Name of Spouse/Father			
Name of Mother			
Address			
Pin Code			
Tel No. Mobile			Date of Birth
Aadhaar No.			Pan No.
MNREGA Job Card No.			
Occupation/Profession	1		

Owning Hous	e :	Y/N	Owning Farm :
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# UNIT 14.3.3: Costs: Fixed vs. Variables: What are Fixed and Variable Costs?

## -Unit Objectives



At the end of this unit, participants will be able to:

· Differentiate between fixed and variable costs

### Resources to be Used



- Participant Handbook
- Blank sheets of paper
- Pens

### -Ask



- What is cost?
- · Will a telephone bill fall under the category of a fixed or variable cost?

### Say



• Discuss: Fixed and Variable cost with examples. Let us do a small activity.

### -Team Activity



#### Identify the type of cost

- 1. Rent
- 2. Telephone bill
- 3. Electricity bill
- 4. Machinery
- 5. Insurance
- 6. Office supplies/Raw materials
- 7. Employee salaries
- 8. Commision percentage given to sales person for every unit sold
- 9. Credit card fees
- 10. Vendor bills

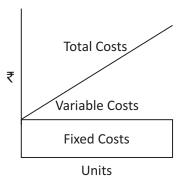
### Do



- Divide the class into two groups. Read out the list of costs given in the activity.
- Read out each item from the cost list and ask the groups in turns to identify whether it is a fixed or variable
  cost.



- We saw that your utility bills like rent, electricity, telephone etc. are all fixed costs because you have to pay it every month.
- Variable costs is an expense which varies with production output or volume. For example commission, raw material etc.
- Discuss "Cost: Fixed vs. variables" with the participants as given in the Participant Handbook.
- Illustrate the relation between the costs with a graph.



Let's learn the difference between fixed and variable cost with the help of an activity.

### Team Activity 🕍



#### Fixed vs. Variable Costs

- This is a group activity.
- You want to start your own entrepreneur business.
- State the type of business you want to start.
- List down all the cost or requirements for your business.
- How will you differentiate between the fixed and variable cost.

#### **Activity De-brief**

- What is the total cost of your business?
- What are the fixed costs?
- What are the variable costs?
- How did you differentiate between the fixed and variable costs?



- Instruct the participants that this is group work.
- Divide the class into small groups of 4 or 6.
- Give each group a sheet of paper.
- Tell the participants that they have to start their own entrepreneur business.
- Ask them the type of business they want to start.
- Instruct them to differentiate between the fixed and the variable costs of the business they want to start.
- Give the participants 15 minutes to discuss and write.
- Keep a check on time. Tell the group to wind up quickly if they go beyond the given time limit.

# -Summarize 📜



· Note: You can summarize the unit either by having a role play between a consultant and a budding entrepreneur explaining the differences between fixed and variable costs or by discussing the key points of the unit.

### Notes for Facilitation



Answers for the activity - Identify the type of cost

Rent (Fixed) 1.

Telephone bill (Fixed) 2.

3. Electricity bill (Fixed)

(Fixed) 4. Machinery

Insurance (Fixed) 5.

6. Office supplies/Raw materials (Variable)

7. **Employee salaries** (Fixed)

Commission percentage given to sales person for every unit sold (Variable) 8.

Credit card fees (Variable)

10. Vendor bills (Variable)

### UNIT 14.3.4: Investments, Insurance and Taxes

## -Unit Objectives 🏻 🎯



At the end of this unit, participants will be able to:

- Describe the main types of investment options
- Describe the different types of insurance products
- Describe the different types of taxes

### Resources to be Used



Participant Handbook

### Ask



- Ask the participants- "What do you see first thing in when you get your mobile bill? Apart from the amount and due date do you have a look at the taxes you are being billed for?
- Why do you think people get their cars insured or have a medical insurance?
- You have saved money and want to invest it, how would you decide what is the best investment for your money?

## -Example



Let's have a look at a few scenarios.

Ranbir has sold his house and deposited the money in his bank. His Chartered Accountant tells him that he will have to re-invest the money otherwise he will have to pay capital tax. What is capital tax and how is it different from income tax?

Jasmeet and Anup are blessed with a baby girl. They decide to have an insurance policy that will mature when their daughter is ready to higher education.

Shivani is working in a corporate office and getting good pay. She will have to pay income tax so she decides to invest her money in tax saving schemes. She goes to the bank manager to discuss the best products in which she can invest.

## -Say



Discuss the Investment, Insurance and Taxes as given in the Participant Handbook.

### ·Ask



How do investments, insurances and taxes differ from each other?

### Say



Let's learn the differences between the three by having an activity.



We will have a quiz today.

## Team Activity 💃



The activity is a quiz.

### ·Do



- Divide the class into groups of three and give a name to each group
- Explain the rules of the quiz. For each correct answer the group gets 1 mark. If the group is unable to answer the question is rolled over to the next group.
- Explain the purpose and duration of the activity.
- On the blackboard write the names of the groups.
- Ask the questions of the quiz.
- Keep a score for the groups.
- Set guidelines pertaining to discipline and expected tasks.

### Summarize 🞏



Summarize the unit by discussing the key points and answering question

### Notes for Facilitation



### Questions for the quiz

1. What are bonds?

Bonds are instruments used by public and private companies to raise large sums of money.

2. Who issues the bonds?

Private and public companies issue the bonds.

3. Why are bonds issued?

To raise large amount of money as it cannot be burrowed from the bank.

4. Who is the buyer of stocks and equities?

The general public is the buyer.

5. What types of scheme is the Sukanya Samriddhi Scheme?

Small Saving Scheme

6. What is the difference between mutual and hedge funds?

Mutual funds are professionally managed financial instruments that invest the money in different securities on behalf of investors. Hedge funds invest in both financial derivatives and/or publicly traded securities.

7. Why is a loan taken from the bank to purchase real estate?

To lease or sell to make profit on appreciated property price.

8. Name the two types of insurances?

Life Insurance and Non-life or general insurance

9. Which insurance product offers financial protection for 15-20 years?

Term Insurance

10. What is the benefit of taking an endowment policy?

It offers the dual benefit of investment and insurance.

11. Mr. Das gets monthly return on one of his insurance policies. Name the policy?

Money Back Life Insurance

12. What are the two benefits of a Whole Life Insurance?

It offers the dual benefit of investment and insurance

13. Which policy covers loss or damage of goods during transit?

Marine Insurance

14. After what duration is the income tax levied?

One financial year

15. What is long term capital gain tax?

It is the tax payable for investments held for more than 36 months.

16. Name the tax that is added while buying shares?

Securities Transaction Tax

17. What is the source of corporate tax?

The revenue earned by a company.

18. Name the tax whose amount is decided by the state?

VAT or Value Added Tax

19. You have bought a T.V. What tax will you pay?

Sales Tax

20. What is the difference between custom duty and OCTROI?

Custom duty is the charges payable when importing or purchasing goods from another country. OCTROI is levied on goods that cross borders within India.

## UNIT 14.3.5: Online Banking, NEFT, RTGS, etc.

## -Unit Objectives 🏻 🍪



At the end of this unit, participants will be able to:

- Discuss the uses of online banking
- Discuss the main types of electronic funds transfer

### Resources to be Used



- Participant Handbook
- Computer System with internet connection
- Debit card

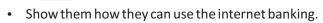
### -Ask



- When was the last time you visited a bank?
- How do you pay your bill for electricity and telephone?
- Have you ever tried to transfer money from one bank account to another bank account using the online banking facility?



- Most of us lead a busy life. Time has become more important than money. In this busy schedule no one has time to stand in bank queues. That's where Online Banking comes in. Online banking or internet banking means accessing your bank account and carrying out financial transactions through the internet.
- Discuss "What is online banking?" from the Participant Handbook.
- There are various advantages of online banking:
  - It saves time, as you need to visit the branch.
  - You can conduct your banking transactions safely and securely without leaving the comfort of your home.
  - Online Banking also gives you round the clock access.
  - Online Banking makes it possible for you to pay your bills electronically.



- Use the computer system and show the demo videos on how to use internet banking provided on most banking sites. the computer system.
- Tell the class the various features of online banking:
  - Through their website set-up your online account.
  - Choose a secure username and password.
  - Set-up your contact information.
  - Once your information is verified, you are good to go.
  - Once you enter the portal explore all the features and learn your way through the portal.
- Discuss about maintaining the security of the online account.



- One of the biggest advantage that online banking offers, as discussed earlier, is transferring money from one account to another. This transaction is called electronic funds transfer. Electronic transfers are processed immediately with the transferred amount being deducted from one account and credited to the other in real time, thus saving time and effort involved in physically transferring a sum of money.
- Discuss "Electronic Funds Transfer" from the Participant Handbook.



- Discuss how to transfer money from one account to another using online banking (NEFT/RTGS, etc.).
- Illustrate with an example.

## Summarize 📜



- Close the discussion by summarizing the about online banking.
- Ask the participants if they have any questions related to what they have talked about so far.

Notes			
Notes 🔳			



# UNIT 14.4: Preparing for Employment & Self Employment

# **Key Learning Outcomes**



At the end of this unit, participants will be able to:

- 1. Discuss the steps to follow to prepare for an interview
- 2. Discuss the steps to create an effective Resume
- 3. Discuss the most frequently asked interview questions
- 4. Discuss how to answer the most frequently asked interview questions
- 5. Identify basic workplace terminology

# **UNIT 14.4.1: Interview Preparation:** How to Prepare for an Interview?

## -Unit Objectives



At the end of this unit, participants will be able to:

Discuss the steps to follow to prepare for an interview

### Resources to be Used



Participant Handbook

### -Ask



- Have you ever attended an interview?
- How did you prepare before going for an interview?



- An interview is a conversation between two or more people (the interviewer(s) and interviewee) where questions are asked by the interviewer to obtain information from the interviewee.
- It provides the employer with an opportunity to gather sufficient information about a candidate and help them select the ideal candidate.
- It also provides the interviewee with an opportunity to present their true potential to the employer, build confidence and help make a decision about the job by asking questions regarding designation, salary, perks, benefits, promotions, transfers, etc.
- Let's do an activity to understand how to prepare for interviews better.

### -Activity 1 💯



· Introducing Yourself

### ·Do



- Select a participant and ask him/her to answer the following questions: "What can you tell me about yourself."
- Give the participant at least one minute to speak.
- Once he/she is done, ask the rest of the participant what they gathered about the participant who was providing information.
- Now repeat the exercise with five other participants.

### -Ask



- What information you should include when you are describing or introducing yourself in an interview?
- What information you should not include when you are describing or introducing yourself in an interview?

# Say



- Tell the participants that when an interviewer asks you to say something about yourself, he/she is not asking you to present your life history.
- Introduction should be short and crisp, and should present you in a positive light. It should include the following points:
  - Any work experience that you might have
  - A brief summary of your educational qualifications
  - Your strengths and achievements
  - Any special projects that you might have been part of
- The following topics should be avoided during an introduction:
  - Detailed description of your family (unless you are specifically asked to do so)
  - Too much information about your weaknesses
  - Information that is not true

# Do



- Congratulate each participant for sharing their points.
- Ask the audience to applaud for them.
- Ask de-brief questions to cull out the information from each group.
- Keep a check on time.

# -Activity 2



Planning the right attire

## Do



• Describe 2 individuals to the participants. One is wearing a casual t-shirt, jeans, and slippers. He has not combed his hair and neither has he trimmed or shaved his beard. The other individual is dressed formally with a shirt and pant, and is well-groomed. He has also worn formal shoes and a belt. Ask the participants which person would they prefer to hire in their organization and why?

# Summarize | 📜



- Close the discussion by discussing 'how to prepare for an interview' as discussed in the Participant Handbook.
- You can add the following points to it:
  - Tell the participants to create a positive and good impression in an interview. It is important for them to prepare for an interview beforehand.
  - The interviewer analyses not only your technical knowledge in relation to the job, but also whether or not you are a fit for the organization.
  - Every employer looks at the whole package and not just one or two things in isolation. Therefore, the way you dress and the way you present yourself is also important along with your skills and talents.
  - The participants will get only one chance to create a good first impression.

# UNIT 14.4.2: Preparing an Effective Resume: How to Create an Effective Resume?

# -Unit Objectives



At the end of this unit, participants will be able to:

· Discuss the steps to create an effective Resume

# Resources to be Used



- Participant Handbook
- Blank papers
- Pens

#### -Ask



- When preparing for an interview, what are the most important things that you need to do?
- What documents do you carry with you, when you go for an interview?
- · What is a resume?
- Why do you need a resume?

#### ·Say



- Resume is not just a sheet of paper with your qualifications printed on it.
- It is a selling tool that will help the employer to see how and what you can contribute for company.
- Talk about the steps involved in creating an effective/attractive resumes discussed in the Participant Handbook.
- Now let's prepare a resume to understand the process in a better way.

# Do



- This is an individual activity.
- · Give the details of the activity.
- Instruct them to read the activity carefully.
- The participant is expected to make an attractive resume based on the information provided.
- Give the class 25-30 minutes to study the case and create a resume.
- At the end of 30 minutes, the participants should exchange the resume with the person sitting next to him or her.
- Every participant will evaluate the resume prepared with their fellow participants.

#### Say



- Do you think the candidate should apply for the job posting described in the advertisement?
- We have already discussed the steps involved in creating an effective/attractive resumes.
- Now let's prepare a resume for the candidate details given in the activity.



#### **Case Study Analysis**

- In the first section of the activity, you are being given the information about a candidate who is applying for a particular job.
- In the second section, you are being given the detailed description of the job posting. Create a resume for the candidate to apply for the job posting.
- Use the information that has been provided about the candidate to create this resume.

#### **Candidate Details**

Nipesh Singla was born on 20th April, 1988 in Chandigarh, India. He currently resides at 1XX7, Sector XX D, Chandigarh –160018. His mobile number is 988XXXXXV01, and e-mail address is nxxxxxxxxxla@gmail.com. Nipesh attended middle and senior school at Government Boys Senior Secondary School, Sector 15, Chandigarh. He has been a very talented boy since school. He was fond of painting and watching old Hindi movies. As part of a school charity program, he volunteered at the children's hospital during his senior years.

In July 2007, he joined Westwood School of Hotel Management, Zirakpur to pursue a diploma course in Hotel Management and Catering. After completing this course, he joined XYZ Group of Hotels as a Housekeeping intern in June 2010 for six months. In this role, he was responsible for cleanliness and maintenance of one floor in the hotel. Taking advantage of his strong interpersonal skills, he also got opportunities to make housekeeping arrangements for corporate meetings. While pursuing education, he gained working knowledge of Microsoft Word, Excel, Access and PowerPoint.

Nipesh is detail-oriented, flexible and adaptable. He has successfully worked with a diverse work force. He gelled well with his peers, both in college and during his internship. After completing the internship, his objective has been to find a job opportunity where he can use his skills and experience. Backed by experience, he is confident about his skills as housekeeping assistant.

#### **Job Posting**

\* Do you see yourself as a HOUSEKEEPING SUPERVISOR?

What's your passion? Whether you're into cricket, reading or hiking, at IHG we are interested in YOU. At IHG, we employ people who apply the same amount of care and passion to their jobs as they do in their hobbies people who put our guests at the heart of everything they do. And we're looking for more people like this to join our friendly and professional team.

#### THE LOCATION:

At the moment, we are looking for HOUSEKEEPING SUPERVISOR to join our youthful and dynamic team at Holiday Inn Amritsar, Ranjit Avenue in Amritsar, Punjab (India). Holiday Inn Amritsar is ideally located in Amritsar's commercial district on Ranjit Avenue with the world famous Golden Temple located only a short distance away. Sparkling chandeliers mark an incomparable arrival experience as you escape to the welcoming environment that is, Holiday Inn Amritsar. The fresh international brand to celebrate and explore Amritsar.

Salary: Negotiable

Industry: Travel / Hotels / Restaurants / Airlines / Railways

Functional Area: Hotels, Restaurants

Role Category: Housekeeping

Role: Housekeeping Executive/Assistant.

**Desired Candidate Profile** 

Friendly, pleasant personality, Service - oriented.

You should ideally be Graduate/ Diploma holder in HM and at least 2 years of experience as a supervisor in good brand with good communication skills, English is a must.

In return we'll give you a competitive financial and benefits package. Hotel discounts worldwide are available as well as access to wide variety of discount schemes and the chance to work with a great team of people. Most importantly, we'll give you the room to be yourself.

\*Please get in touch and tell us how you could bring your individual skills to IHG.

Education-

UG: Any Graduate/Diploma holder

PG: Post Graduation Not Required

#### Say



• Now, let's share the resume with the fellow participant sitting next to you and evaluate each other's effort.

# Do



- Congratulate each participant for making their first attempt towards creating an effective resume.
- As a follow up activity, you can suggest them to prepare their own resume and show it to you the next day.

#### Summarize \



- Close the discussion by showing some effective resume samples to the candidates.
- Ask the participants what they have learnt from this activity.
- Ask if they have any questions related to what they have talked about so far.

#### Notes for Facilitation



- Keep printed copies of the activity ready for the session.
- Put down the suggested format of the resume on the board while explaining the steps in preparing a resume.
- Do check the participants' resume and suggest necessary changes.
- Suggested example for the case presented:

Nipesh Singla

#1XX7, Sector XX-D

Chandigarh-160018

Mobile No: 91-988XXXXX01

E-mail: nxxxxxxxxxla@gmail.com

**Objective:** Seeking an opportunity to use my interpersonal skills and experience to contribute to your company's growth, profitability and objectives.

#### **Professional strengths:**

- Proficient in housekeeping
- Experienced in and capable of working with a diverse work force
- Team player and friendly in nature
- Successful working in a multi-cultural environment

- Detail oriented, flexible, and adaptable
- Knowledge of Microsoft Word, Excel, Access and PowerPoint

#### **Educational background:**

- Diploma in Hotel Management and Catering, Westwood School of Hotel Management, Zirakpur
- High School, Government Boys Senior Secondary School, Sector 15, Chandigarh

#### **Professional internships:**

- Housekeeping Intern, XYZ Group of Hotels, New Delhi (June 2010 August 2010)
  - Responsible for cleanliness and maintenance of one floor in the hotel.
  - Got opportunities to make housekeeping arrangements for corporate meetings.

#### **Volunteer Work:**

• Student volunteer at children's hospital in Chandigarh.

Nipesh Singla

#### UNIT 14.4.3: Interview FAQs

# -Unit Objectives 🏻 🎯



At the end of this unit, participants will be able to:

- Discuss the most frequently asked interview questions
- Discuss how to answer the most frequently asked interview questions

# -Resources to be Used 🏻 🔗



Participant Handbook



- Tell the participants you will provide them with interview situation and questions and they have to try to answer them.
- Tell them you will also explain the different ways to approach these questions.

# Do



- Divide the class in pairs and ask the participants to perform a role play.
- One partner will play the role of the interviewer while the other will play the role of the interviewee.
- Tell them the interviewer can start the interview by asking the interviewee to introduce himself/herself.
- Call all the pairs one by one in front of the class to enact the role play.
- Follow the same pattern for all other situations.
- Time allotted for each situation is 8-10 minutes.
- Congratulate each participant for giving their input.
- Ask the class to applaud each time a team has completed their role play.
- Keep a check on time.

# -Role Play 🔽



Conduct a role play for the situation given.

#### Situation 1

- The interviewer will start by asking the interviewee a few generic questions such as:
  - What is your name?
  - Tell me something about yourself?
  - Can you tell me something about your family?
- Then, the interviewer will bluntly ask the following questions:
  - How do you explain this huge time gap in your resume?
  - What is the reason for this?
  - Weren't you looking for a job or is it that no one selected you?

# Say



#### De-brief:

- When you put information on your resume, you should be prepared to answer any questions about it.
- Be present and focused on the questions being asked to you.
- One way of tackling the blunt questions is to tell the interviewer you did not come across an opportunity where you were sufficiently satisfied with both the remuneration offered as well as the profile. Therefore, you waited for the right opportunity to come along while looking for an ideal job.

# -Role Play 😴



Conduct a role play for the situation given.

#### Role Play - Situation 2

- The interviewer will start by asking the interviewee a few generic questions such as:
  - What is your name?
  - Tell me something about yourself?
  - Can you tell me something about your family?
- Then, at the end of the interview, ask the interviewee:
  - There are over 200 people who have applied for this job, some with excellent work experience. Why should I hire you?

## Say



#### De-brief:

- There is nothing wrong with stating your strengths and achievements. However, do not come across as arrogant or too boastful.
- You need show the interviewee that you have unique skills or talents to contribute to the company. The interviewer needs to know how you stand apart from the rest of the crowd.
- Tell the interviewer you are looking forward to working with the company and that you are a hard-working individual.

# -Role Play 😴

Conduct a role play for the situation given.

#### Role Play - Situation 3

- The interviewer will start by asking the interviewee a few generic questions such as:
  - What is your name?
  - Tell me something about yourself?
  - Can you tell me something about your family?
- Then, lean forward, clasp your hands on the table and in a soft voice ask the interviewee:
  - Did you ever experience any neglect or disregard from your previous office? In other words, did you ever suffer because your office or team displayed favouritism?

# Say



#### **De-brief:**

- Keep this in mind: Do not criticize anyone during an interview.
- You are free to express your opinion, however, your language, answers, body language, and the tone of your voice should remain constructive and neutral.
- Since criticism will show you in negative light, you should keep your answers honest yet diplomatic.
- You can tackle such questions by saying, "I got along well with most of my faculty and peers."

# Role Play 🥰

Conduct a role play for the situation given.

#### Role Play - Situation 4

- The interviewer will start by asking the interviewee a few generic questions such as:
  - What is your name?
  - Tell me something about yourself?
  - Can you tell me something about your family?
- Then very bluntly ask the interviewee:
  - How long do you plan to stay with this company if you are selected?
- After the candidate responds, ask sarcastically:
  - Do you seriously mean that?

#### Say



#### De-brief:

- Don't provide unreal and idealistic answers.
- Your answers should be honest yet diplomatic. In a situation like this, the interviewer does not expect you to provide a specific timeline.
- You can say something like, "I would like to stay with the company as long as I can contribute constructively and develop as an employee, within the organization, professionally and financially."

# Role Play



Conduct a role play for the situation given.

#### Role Play - Situation 5

- The interviewer will start by asking the interviewee a few generic questions such as:
  - What is your name?
  - Tell me something about yourself?
  - Can you tell me something about your family?
- Ask him/her how important he/she thinks it is to be punctual in the corporate world.
- After he/she answers, look up sternly at the interviewee and in a crisp voice, say:
  - You were late for this interview by 10 minutes. That surely does not seem to be in line with what you just said?

## Say



#### **De-brief:**

- Politely apologize for being late.
- You can add something such as, "I assure you this is not a habit". All your future actions should be in line with this statement.
- Avoid giving any excuses.
- You might feel obligated to provide a justification for your tardiness, but the interviewer is not interested in that.
- Do not over apologize. Once this response is out of the way, turn your focus back to the interview.



Conduct a role play for the situation given.

#### Role Play - Situation 6

- The interviewer will start by asking the interviewee a few generic questions such as:
  - What is your name?
  - Tell me something about yourself?
  - Can you tell me something about your family?
- After asking a few academic or job-related questions, ask the interviewee:
  - If you get this job, what salary package do you expect us to give you?

## Sav



#### De-brief:

If there is no way for you to avoid this question, respond to the interviewer by providing a reasonable and well-thought out salary range.

# Role Play 🔽



Conduct a role play for the situation given.

#### Role Play – Situation 7

- The interviewer will start by asking the interviewee a few generic questions such as:
  - What is your name?
  - Tell me something about yourself?
  - Can you tell me something about your family?
- Then, bringing the interview to a close, ask the interviewee:
  - Do you have any questions for me?

## Say



#### **De-brief:**

- Ask relevant questions.
- Don't bombard the interviewer with questions.
- If you have questions about the result of the interview, you can limit your questions to 1 or 2. Keep them short and relevant like:
  - When will I be informed about the results of the interview?
  - What are the working hours?
  - Will the job require me to travel?

# -Explain



- Tell the participants to be prepared for answering different types of questions in an interview.
- Stay calm and focused, and take a moment to think about how you should respond. Always maintain a confident tone.
- Even if you don't intend to, your body language conveys your level of discomfort with a particular question. Try to keep your actions, tone, and gestures neutral.
- Maintain your composure while answering personal question.

# Do



- Tell all the participants to form pairs again.
- Tell them to use the following list of frequently asked interview questions to conduct mock interviews.
- They will use all or some of these questions to conduct mock interviews with their partners.
- One partner will play the role of the interviewer while the other will play the role of the interviewee.
- After they are through asking and answering the questions, the roles will be reversed.
- The same list of questions will be used again.
- After each mock interview ask the interviewer to provide feedback and clear any doubts that may arise.
- Time allotted for each situation is 30-35 minutes.

# -Activity 🎉

#### **Mock Interview Questions**

**Mock Interview Questions** 

Tell me something about your family.

What qualities would you look for in a Manager or a Supervisor?

Why did you apply for this job?

What do you know about this company?

How do you deal with criticism?

How do you plan to strike a good work-life balance?

Where do you see yourself five years from now?

Have you applied for jobs in other companies?

What kind of salary do you expect from this job?

Do you have any questions for me?

# -Summarize 🔎



- Close the discussion by discussing the questions in the both activities.
- Ask the participants what they have learned from this activity.
- Ask if they have any questions related to what they have talked about so far.

# UNIT 14.4.4: Work Readiness – Terms and Terminology

# -Unit Objectives | @



At the end of this unit, participants will be able to:

Identify basic workplace terminology

# Resources to be Used 🏻 🖑



- Participant Handbook
- Chart papers
- Blank sheets of paper
- Pens

## -Ask



- What do you understand by workplace terminology?
- Are offer letter and contract of employment the same?



Let's start this unit with an activity.

# **Team Activity**



#### Workplace terminology

This is a group activity conducted in three parts.

#### Part 1

Sheila received a call from the recruiter of MND Company. Before she is recruited by the company, think of the recruitment process she will have to go through. Start from the telephone call to signing her letter of acceptance. Write down all the words that come to your mind.

#### **Activity De-brief**

- Have the participants read out the words they have written
- Encourage all the participants to participate in the activity

# -Do



- Divide the class into small groups of 4 or 6.
- Instruct the participants that they will be doing a brainstorming activity.
- Give them one chart paper each. Tell them to divide the chart in two parts.
- Instruct them that they have to use one half of the chart paper now. The other half will be used later.
- The participants have to write all the words that come to their mind related to the recruitment process.
- Give them 10 minutes to do the activity.
- Tell them that there are no right or wrong answers.
- Keep a track of the time.

## Say



- You all know quite a few words related to the terms used in the office.
- Let us talk about some new terms that have been missed out.
- Discuss "Work Readiness Terms and Terminology" with the participants as given in the Participant Handbook.

#### Ask



- · Why is it important to know the workplace terms?
- How do they help?
- Can the words be categorised further?

# Say



• Let's now continue the activity.

# **Team Activity**



#### **Terms and Terminology**

• This is again a group activity. The members of the group remain the same as in Activity 1.

#### Part 2

With the help of the new terms you have learned, make a flow chart of the hiring process of MND Company.

#### **Activity De-brief**

• Ask the groups to share the flow charts and the new terms they added while preparing the flow chart.

## -Do



- Instruct the participants that they have to use the 2nd half of the same chart they had used before.
- Using the new terminology and the terms they had previously written on the chart, they have to make a flow chart of the hiring process of the MND Company.
- Give them 10 minutes for this activity.
- Keep a check on time. Tell the group to wind up quickly if they go beyond the given time limit.

## Say



Let's go ahead with the activity.

## **Team Activity**



#### **Terms and Terminology**

The activity continues with the same group members.

#### Part 3

Sheila now works for the MND Company. She is not aware of the company culture and policies. She goes to the HR Department to get her doubts clarified. Can you think of the terms for which she wants clarity? Make a list of those words.

#### **Activity De-brief**

• Ask the groups to share their list of words. Some of the words are benefits, comp. time, deduction, employee training, holidays, lay-off, leave, maternity leave, mentor, notice, paternity leave, and time sheet.

- Instruct the participants to identify the key terms an employee of a company should know. They can use the same chart paper for this activity.
- Give them 5 minutes for this activity.
- Keep a check on time. Tell the group to wind up quickly if they go beyond the given time limit.

# -Summarize 📜



Note: You can either summarize the key points of the unit or have a role play where an employee has just joined a company and the HR Manager explains the terms of employment.



# **UNIT 14.5: Understanding Entrepreneurship**

# **Key Learning Outcomes**



#### At the end of this unit, participants will be able to:

- 1. Discuss the concept of entrepreneurship
- 2. Discuss the importance of entrepreneurship
- 3. Describe the characteristics of an entrepreneur
- 4. Describe the different types of enterprises
- 5. List the qualities of an effective leader
- 6. Discuss the benefits of effective leadership
- 7. List the traits of an effective team
- 8. Discuss the importance of listening effectively
- 9. Discuss how to listen effectively
- 10. Discuss the importance of speaking effectively
- 11. Discuss how to speak effectively
- 12. Discuss how to solve problems
- 13. List important problem solving traits
- 14. Discuss ways to assess problem solving skills
- 15. Discuss the importance of negotiation
- 16. Discuss how to negotiate
- 17. Discuss how to identify new business opportunities
- 18. Discuss how to identify business opportunities within your business
- 19. Explain the meaning of entrepreneur
- 20. Describe the different types of entrepreneurs
- 21. List the characteristics of entrepreneurs
- 22. Recall entrepreneur success stories
- 23. Discuss the entrepreneurial process
- 24. Describe the entrepreneurship ecosystem
- 25. Discuss the purpose of the Make in India campaign
- 26. Discuss key schemes to promote entrepreneurs
- 27. Discuss the relationship between entrepreneurship and risk appetite
- 28. Discuss the relationship between entrepreneurship and resilience
- 29. Describe the characteristics of a resilient entrepreneur
- 30. Discuss how to deal with failure

# UNIT 14.5.1: Concept Introduction (Characteristic of an Entrepreneur, types of firms/ types of enterprises)

# -Unit Objectives



At the end of this unit, participants will be able to:

- Discuss the concept of entrepreneurship
- · Discuss the importance of entrepreneurship
- Discuss the characteristics of an entrepreneur
- Describe the different types of enterprises

#### -Resources to be Used 🎏



Participant Handbook

# Say



Let's start this session with some interesting questions about Indian entrepreneurs.

# -Team Activity 💃



#### **Quiz Questions**

1. Who is the founder of Reliance Industries?

Dhirubhai Ambani

2. Who is the Chairman of Wipro Limited?

Azim Premji

3. Who launched e-commerce website Flipkart?

Sachin Bansal and Binny Bansal

4. Who is the founder of Paytm?

Vijay Shekhar Sharma

5. Who is CEO of OLA Cabs?

**Bhavish Aggarwal** 

6. Who is the founder of Jugnoo?

Samar Singla (autorickshaw aggregator)

7. Who is the founder of OYO Rooms?

Bhavish Aggarwal

#### -Do



- Tell them that you will ask them few questions about a few entrepreneurs.
- Divide the class in to two groups.
- In turns ask the quiz questions to the groups.
- If the answer is incorrect pass the question to the other group.
- Share the answer if the groups are not able to answer.
- Congratulate the participants who answered correctly.

#### Ask



- · What do you understand by entrepreneurs?
- What is the importance of entrepreneurship in today's scenario?
- What do you think are the characteristics of successful entrepreneurs?
- What are different types of enterprises that an entrepreneur in India can own and run?

#### Say



- Talk about entrepreneurs, importance of entrepreneurship, characteristics of successful entrepreneurs, and different types of enterprises in India as discussed in the Participant Handbook.
- Tell the participants, stories of successful Indian entrepreneurs- their struggles, the moments of heartbreak, the perseverance and triumph.
- Ask them if they know of any such entrepreneur.

## ·Summarize 📜



• Close the discussion by summarizing about the opportunities for entrepreneurs in India.

## -Notes for Facilitation



- Check out different Government schemes for small entrepreneurs. Share the information with the participants.
- You can tell them about the government websites like Start Up India, mudra.org.in etc.
- Discuss about various schemes and policies by the Government of India for entrepreneurs.

# UNIT 14.5.2: Leadership and Teamwork

# -Unit Objectives 🏻 🎯



At the end of this unit, participants will be able to:

- List the qualities of an effective leader
- Discuss the benefits of effective leadership
- List the traits of an effective team

#### -Resources to be Used



- Participant Handbook
- Blank sheets of paper
- Pens

## -Do



- Show the picture given below to the class.
- Ask them to quickly write on a piece of paper what comes to their mind after seeing the picture.
- Now ask them, "What do you understand from this picture?"
- Encourage participants to share their thoughts.





## -Say



- This picture depicts the qualities of a leader and the difference between a leader and a boss.
- A boss focuses on structure and inspires fear whereas a leader follows vision and generates enthusiasm.
- A boss blames employees for the breakdown whereas a leader fixes breakdowns.
- A boss depends on authority whereas a leader depends on goodwill.
- A boss says "I" and a leader says "We."
- A boss drives employees whereas a leader coaches them.
- A boss takes credit whereas a leader gives credit.

# -Say



• Talk about leadership and leadership qualities for an entrepreneur as discussed in the Participant Handbook.

#### ·Ask



Why is it important for a leader to be effective? How does it help the organization?



- Let us discuss benefits of effective leadership as discussed in the Participant Handbook.
- "Out-of-the-box thinking" is one of the new leadership styles. It means thinking differently and from a new perspective.

#### -Ask



· Do you consider yourself a team player?

# Team Activity



#### **Long Chain**

• This is a group activity.



- Divide the class into 2 teams.
- Ask each team to create a chain using materials they have in class such as shoe laces, belts, paper, handkerchief, ribbons, etc.
- The team that creates the longest chain wins the game.
- Observe if the participants are interacting with their team or working in isolation.
- Share your observations with the class.

## Sav



#### De-brief:

- What did the winning team do differently?
- Who was responsible for the winning team's success?
- How does this activity explain the role of teamwork in entrepreneurial success?

## Sav



- Tell the class that both the teams performed well.
- Discuss that the objective of this activity was to open communication channels and how this has been achieved.
- The participants should aim to keep the communication channels open when interacting with their peers and team members.
- It will set the pace and enthusiasm required for all the ensuing teamwork activities.
- Talk about teamwork and importance of teamwork in entrepreneurial success as discussed in the Participant Handbook.

# Summarize | 🎏



- Close the discussion by summarizing about the importance of teamwork for employees.
  - Teamwork helps in reducing stress for the employees.
  - · Teamwork helps employers in generating more number of solutions to a problem and developing improved communication amongst employees.
- Ask the participants what they have learned from these exercises.
- Ask if they have any questions related to what they have talked about so far.

# UNIT 14.5.3: Communication Skills: Listening & Speaking: The Importance of Listening Effectively

# -Unit Objectives



At the end of this unit, participants will be able to:

- Discuss the importance of listening effectively
- Discuss how to listen effectively
- Discuss the importance of speaking effectively
- Discuss how to speak effectively

# -Resources to be Used 🎏



Participant Handbook

# -Activity 1



#### Activity - Chinese Whisper

Step 1: Form a circle.

Step 2: Start a whisper chain. Any one participant will whisper a message into his/her neighbour's ear. No one else must hear the message. The message can be serious or downright silly.

Step 3: The next person who first heard the message should whisper the message very quickly to the person sitting next to them.

Step 4: The game goes on until the last person says whatever they heard out loud and the first person reveals the real message.

Compare them and have a great laugh!

#### Ask



#### **De-brief questions:**

- Was the original message the same as the message that is communicated at the end of the game?
- Why do you think there was a difference in the messages?

#### Say



- No, the original message was not same at the end of game.
- The barriers to communication like language, disturbance and noise, poor listening skills, boredom, poor speaking skills, etc. are the potential reasons this happens.
- There are various aspects to communication. Speaking skills and listening skills are two major components to any communication. There is always some room for improvement in the way we communicate.
- It is important to accept the reality of miscommunication and work to minimise its negative impacts.

# Say



- Communication is a two-way process where people exchange information or express their thoughts and feelings
- It involves effective speaking and effective listening.
- If I go to the store to get bread, I exchange money for the bread. I give something and get something in return. Communication takes place in the same manner. You have to provide and receive information for communication to take place.

#### Ask



- How often do you hear these statements?
  - "You're not listening to me!"
    - "Why don't you let me finish what I'm saying?"
    - "You just don't understand!"
- What do you think the other person is trying to convey to you through these sentences?
- We will not talk about the importance of listening effectively as discussed in the Participant Handbook.

#### Say



• Let's play a game to understand effective listening process better.

#### Do



- This is a class activity.
- The participants need to answer the questions they hear.
- · Instruct them to listen carefully.
- You will read it at a stretch and if need be repeat it once more.
- Tell the participants to raise their hand if they know the answer to the question asked.
- Keep a check on time.

# -Activity 2



#### Riddles:

Is there any law against a man marrying his widow's sister?

If you went to bed at eight o'clock at night and set the clock's alarm to ring at nine o'clock, how many hours of sleep would you get?

Do they have a 26th of January in England?

If you had only one match and entered a dark room that had a kerosene lamp, oil heater, and a wood stove, what would you light first?

The Delhi Daredevils and the Chennai Super Kings play five IPL matches. Each wins three matches. No match was a tie or dispute. How is this possible?

There was an airplane crash. Every single person died, but two people survived. How is this possible?

If an airplane crashes on the border of two countries, would unidentified survivors be buried in the country they were travelling from?

A man builds an ordinary house with four sides except that each side has a southern exposure. A bear comes to the door and rings the doorbell. What is the colour of the bear?

#### **Answers:**

There's no law against a man marrying his widow's sister, but it would be the neatest trick in the book since to have a widow, the man would have to be dead.

You'd get one hour's sleep since alarm clocks do not know the difference between morning and night.

Oh, yes. They have a 26th of January in England. They also have a 27th, a 28th, and so on.

First of all, you would light the match.

Who said the Delhi Daredevils and the Chennai Super Kings were playing against each other in those games?

Every SINGLE person died, but those two were married.

You can't bury survivors under any law especially if they still have enough strength to object.

The bear that rang the doorbell would have to be a white bear. The only place you could build a house with four southern exposures is at the North Pole where every direction is in South.

#### -Ask



#### **De-brief question:**

- What were the barriers that came into your way of listening?
- How can you overcome barriers to listening?

#### Say



- There is a difference between hearing and listening.
- If you don't listen properly, the message may be misunderstood.
- Be open-minded while listening to someone.
- It is important to listen effectively and carefully without making assumptions.

## -Activity 3



#### **Elevator Pitch:**

You are in the lift of a hotel and you bumped into your former client who is a famous businessman. He has financed a lot of small business ventures and can finance your new start-up too. After exchanging pleasantries, he asks you what your new company does. You open your mouth, and then pause. Where do you even begin?

Then, as you try to organize your thoughts, his meeting is called, and he is on his way. If you would been better prepared, you're sure that he would have stayed long enough to schedule a meeting with you too.

If you were given another chance, what would you have said to this person?

## Do



- Start off the task by providing a beginning sentence to get the story started, and then go around the classroom getting each one to add a new sentence to keep the story going.
- This task should be done spontaneously allowing only a little time to think (30 seconds).
- For example: There was once a student who was looking for a job after graduation.

#### -Notes for Facilitation



- Tell the participants to follow these steps to create a great pitch, but bear in mind that you'll need to vary your approach depending on what your pitch is about.
  - 1. **Identify Your Goal:** Start by thinking about the objective of your pitch. For instance, do you want to tell the potential clients about your organization? Do you have a great new product idea that you want to pitch to an executive or do you want a simple and engaging speech to explain what you do for a living?
  - 2. **Explain What You Do:** Start your pitch by describing what your organization does. Focus on the problems that you solve and how you help people. Ask yourself this question as you start writing: what do you want your audience to remember most about you? Keep in mind that your pitch should excite you first. After all, if you don't get excited about what you're saying neither will your audience. People may not remember everything that you say, but they will likely remember your enthusiasm.
  - 3. **Communicate Your USP:** Your elevator pitch also needs to communicate your unique selling proposition or USP. Identify what makes you, your organization or your idea unique. You'll want to communicate your USP after you've talked about what you do.
  - 4. **Engage with a Question:** After you communicate your USP, you need to engage your audience. To do this, prepare open-ended questions (questions that can't be answered with a "yes" or "no" answer) to involve them in the conversation. Make sure that you're able to answer any questions that he or she may have.
  - 5. **Put it all Together:** When you've completed each section of your pitch, put it all together. Then, read it aloud and use a stopwatch to time how long it takes. It should be no longer than 20-30 seconds. Remember, the shorter it is, the better!

#### **Example:**

Here's how your pitch could come together:

"My company deals with cloth retail online business and we use various e-commerce platforms to sell our products. This means that you can do shopping with ease and spend time on other important tasks. Unlike other similar companies, we have a strong feedback mechanism to find out exactly what people need. This means that, on average, 95 percent of our clients are happy with our products. So, how can you help us in creating our own web portal?

6. **Practice:** Like anything else, practice makes perfect. Remember, how you say it is just as important as what you say. If you don't practice, it's likely that you'll talk too fast, sound unnatural or forget important elements of your pitch. Set a goal to practice your pitch regularly. The more you practice, the more natural your pitch will become. Practice in front of a mirror or in front of colleagues until the pitch feels natural.

# Summarize 🔎



• Close the discussion by summarizing how to speak effectively as discussed in the Participant Handbook.

# UNIT 14.5.4: Problem Solving & Negotiation Skills

# **Unit Objectives**



At the end of this unit, participants will be able to:

- Discuss how to solve problems
- · List the important problem solving traits
- Discuss ways to assess problem solving skills
- · Discuss the importance of negotiation
- · Discuss how to negotiate

## Resources to be Used



Participant Handbook

#### Ask



- What is a 'problem'?
- What do you think are the problems you may face in the process of becoming a successful entrepreneur?

# Say



- Discuss the definition of problem as given in the Participant Handbook.
- In a hurdle race the hurdles are the obstacles on the way to reach your goal.
- Similarly, obstacles are the hurdles you may face while reaching your goal i.e. to set-up your own business. Your goal will be to reach the finishing line after crossing these hurdles.

#### -Ask



- What do you do when you face a problem?
- How do you resolve it? You can pick examples from the question asked previously 'the problems they are likely to face in the process of becoming a successful entrepreneur'.

# Say



• Discuss how to solve problems as given in the Participant Handbook.

# Team Activity



- This is a group activity.
- The groups will solve the problem and come up with the best solution in each case.
- 1. Unable to arrange for some extra finance for setting up a beauty parlour. The loan sanctioned and disbursed is not enough. You have tried all your contacts, friends and relatives. But unable to manage the extra amount. Bank will not sanction more amount as you have used up the complete sanction limit.
- 2. You have rented a space for your business and all arrangements are done. You will be operating from the office space rented in two days. Now the owner comes up to you and says he wants to sell the place and wants you to vacate in 15 days.
- 3. You have just set up your business and need extra human resource. You have tried invieing a few also tied up with an agency for getting the right candidate. But you are unable to get the right candidate. If the candidate is good, you cannot offer the salary demanded. If the candidate agrees to the salary, he/she has other demands like working hours to be reduced, leaves etc. which may not work for your set up.

# Do



- Divide the class into three groups. Give one scenario to each group.
- Explain the purpose and duration of the activity.
- Ask the groups to build on the scenario and present their solution as a role play.



#### **De-brief questions:**

- 1. What was the problem?
- 2. Is there any other alternative solution?
- 3. Is this the best solution presented?

## Ask



Try to think of some people around you who are able to solve problems very easily. Even you or your friends might be approaching them when there is a problem. What qualities do they have? What personality traits do such people possess?



Discuss the important traits for problem-solving as given in the Participant Handbook.

## Ask



In order to build a successful organization, you need to hire people who possess good problem solving skills. How would you assess the level of problem solving skills of potential candidates before hiring them?



Discuss how to assess for problem-solving skills as given in the Participant Handbook.

# Summarize | 📜



- Ask the participants the things that they have learnt so far.
- Ask if they have any questions related to what they have talked about so far.
- Summarize the discussion on problem solving.

# - Activity



The activity is to organise an election event. Select three volunteers from the group. They have to give a speech on their election manifesto to the class. They have to negotiate with the fellow participants and convince them to vote for them. The best negotiator will win the election.

## Do



- Ask three participants to volunteer for the activity.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.

#### Ask



- Out of the three contestants, whom would you support? Why? What did they say or do which convinced you to make your decision?
- Have you ever tried to negotiate in your personal or professional life?
- Ask the class to share some of their experiences where they have been able to strike a deal by negotiating.

## Say



• Discuss "What is Negotiation?" as given in the Participant Handbook.

#### Ask



 Why is it important to negotiate? As an entrepreneur, where do you think that negotiation skills will be needed?

# Say



• Discuss the importance of negotiation while starting a business as given in the Participant Handbook.

#### Say



• Discuss the important steps to negotiate as given in the Participant Handbook.

# -Role Play



- · Conduct a role play activity.
- Ask the participants to assemble together.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.

## Do



- Divide them into groups of four (4) (depending on the batch size).
- Give them the hand-outs for role play scenarios.
- Two groups to be given scenarios on problem solving.
- Other two groups to be given scenarios on negotiation.
- The groups will build on the scenarios and prepare for the role play.
- Give the groups at least 5 mins to discuss and be ready with the role play.
- Invite each group one by one to come and present their role play.

#### Problem solving Scenario 1

Avinash has a Mobile Repair Store in Allahabad. His outlet is one of the most popular one in the vicinity and he has great rapport with his customers. He is always well-dressed, jovial and full of energy.

It's around 11 AM, when a customer barges in to the shop and starts shouting at Avinash for giving her back the instrument which is still not working. The screen of her mobile is also cracked from one side. Avinash remembered thoroughly checking the handset before handing it over to the customer. The customer threatens to sue the company and to go to Consumer Court for cheating her.

#### Problem solving Scenario 2

You are running a successful small scale business, Shreeji Aggarbattis,. Your staff members do door to door selling and organise marketing campaigns in local markets. Your brand has established it's name in last few years.

Recently, lot of customers have been coming to you and lodging complaints that your staff members indulge in malpractices. Few of them informed you that a staff member engaged them in a friendly conversation. In the meanwhile, the other gave them lesser packets of aggarbattis than they paid for.

Another set of customers lodged complaint about the misconduct and rude behaviour of a particular staff member.

You often hear from your customers that the orders don't get delivered on time or wrong products get delivered.

You have already been struggling with shortage of staff and such complaints are a serious concern as it is hampering your brand image. What strategies will you adopt to solve this problem?

#### Negotiation Scenario 1

You have interviewed a prospective new employee who could be a key member of your new entrepreneurial venture. The new person is demanding a salary that is 20% higher than you thought based on your business plan. Finances are tight, yet you believe this person could make a significant impact on future profits. If you paid the required salary for the new person, then you would have to restructure your entire business plan. You've been searching for an individual with this skill level for three months. to the candidate is waiting for your response. Now you have to call him into make the final negotiations.

#### **Negotiation Scenario 2**

You are a young entrepreneur who has just registered his start up project and applied for a bank loan accordingly. You receive a letter saying that your loan application has been rejected as your start up idea did not appeal to the bank and they think that it is not a revenue generating model. You have taken an appointment to meet the manager and show your negotiation skills to get your loan approved.

#### Notes for Facilitation



#### **Facilitating Role Plays**

#### Preparing for the activity

- 1. Carefully review the details of the scenario and the character descriptions.
- 2. Become familiar with the key issues being addressed in the scenario.
- 3. Study the provided material so that you are ready to address issues related to the situations depicted in the role-plays.
- 4. Anticipate and know how to address issues participants might raise during the activity.

#### Conducting the activity

- 1. Introduce the activity. Emphasize that role-playing provides participants with an opportunity to apply their new knowledge, skills, and tools in situations that simulate actual interactions with customers.
- 2. Ask participants to form pairs. Direct the members of each group to choose who will play the roles. Remind the groups that each participant should be given the opportunity to play/practice the different roles.
- 3. Conduct a demonstration so that participants become familiar with the expectations related to the roles and support materials.
- 4. Give the pairs/groups 10 to 15 minutes to conduct the role-play (depending on the duration of the session).
- 5. After all the groups have finished with the role-play, conduct a debriefing session on each role-play.
- 6. Ask the groups to take five minutes to talk about what happened during the role-play. The groups should discuss the questions given in the debriefing for each role-play. Encourage participants to provide constructive criticism during their discussions.

## -Summarize



• Wrap the unit up after summarizing the key points and answering questions.

# UNIT 14.5.5: Business Opportunity Identification: **Entrepreneurs and Opportunities**

# -Unit Objectives



At the end of this unit, participants will be able to:

- Discuss how to identify new business opportunities
- Discuss how to identify business opportunities within their business

# Resources to be Used



- Participant Handbook
- Blank sheets of paper
- Pens

#### -Ask



- How does an entrepreneur identify an opportunity?
- What do you think are the common queries or concerns faced by entrepreneurs?
- How can you identify new business opportunity?

# Sav



- Let's talk about opportunity, common queries or concerns faced by entrepreneurs, idea as an opportunity, factors to consider when looking for opportunities, ways to identify new business, and opportunity analysis as discussed in Participant Handbook.
- Let's do an activity to understand ways to identify business opportunities within your business.

#### Do



- Tell the class that this is an individual activity.
- Tell the participants to create a matrix on their notebooks.
- There will be four boxes in your matrix.
- Strength, Weakness, Opportunity and Threats will be the four headings of the matrix. This is called the SWOT matrix.
- Read out the questions to them and tell the participants they need to answer the questions asked in each matrix.
- Tell them they can also use their own understanding of themselves to fill the SWOT matrix.

# **Activity**



#### Do your SWOT analysis

#### Strength

What are your strengths?

What unique capabilities do you possess?

What do you do better than others?

What do others perceive as your strengths?

#### Opportunity

What trends may positively impact you?

What opportunities are available to you?

#### Weakness

What are your weaknesses?

What do your competitors do better than you?

#### **Threat**

Do you have solid financial support?

What trends may negatively impact you?

# Do



- Congratulate everyone for the class activity.
- Ask the audience to applaud for themselves.
- Allot the participants sufficient time to complete this activity, but do keep a check on time.
- Ask de-brief questions to cull out information from the participants.

#### -Ask



#### **De-brief questions:**

- What are your weaknesses according to your SWOT analysis?
- Do you think you can change your weakness into strength? How?
- Do you think you can work on your threats? How?

#### -Summarize 📜



- Close the discussion by summarizing ways to identify business opportunities within your business.
- Ask the participants what they have learned from this exercise.
- Ask if they have any questions related to what they have talked about so far.

# UNIT 14.5.6: Entrepreneurship Support Eco-System

# Unit Objectives | ©



At the end of this unit, participants will be able to:

- · Explain the meaning of entrepreneur
- Describe the different types of entrepreneurs
- List the characteristics of entrepreneurs
- Recall entrepreneur success stories
- Discuss the entrepreneurial process
- Describe the entrepreneurship ecosystem
- Discuss the purpose of the 'Make in India' campaign
- Discuss the key schemes to promote entrepreneurs

## -Resources to be Used



- Participant Handbook
- Chart papers
- Marker pens
- Pencils
- Colour pencils
- Scale
- Eraser
- Other requisite stationery material

#### -Ask



- Do you think that entrepreneurs need support?
- What do you think is an eco-system?
- What do you think 'entrepreneurship support eco-system' means?

## -Sav



- Let's learn what entrepreneurship support eco-system means.
- Discuss 'Entrepreneurship Support Eco-System' as given in the Participant Handbook.

## -Ask



- Can you define entrepreneurship support eco-system?
- What are the key domains of the support eco-system?

## -Say



- Let's learn more about these domains by conducting an activity.
- You have to make a poster showing the components of the six main domains of entrepreneurship support eco-system.

# Team Activity



Making a poster showing the entrepreneurship support eco-system.

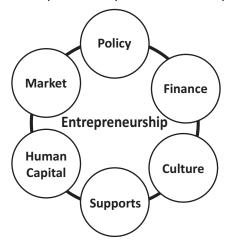
# Do



- Divide the class into groups of four or six.
- Hand out chart paper and coloured pens.
- Explain the purpose and duration of the activity.
- Go around checking the progress of each group.
- Set guidelines pertaining to discipline and expected tasks.

#### **Activity De-brief**

Ask each group to display their poster and explain the key domains of entrepreneurship support eco-system.



#### -Ask



What kind of government support eco-system is available for entrepreneurs in India?

## Say



Discuss 'Make in India' campaign as given in the Participant Handbook.

# Team Activity



Presentation on key schemes to promote entrepreneurs



- Divide the class into pairs.
- Number each pair from 1-15.
- Assign a scheme, same as their group number, to each group.
- Ask them to read the scheme carefully and present it to the class.
- Explain the purpose and duration of the activity.
- Go around checking the progress of each group.
- Set guidelines pertaining to discipline and expected tasks.

#### **Activity De-brief**

• Ask each group to explain the scheme offered by government to promote entrepreneurs.

# Summarize | 📜



Summarize the unit by discussing the key points and answering questions the participants may have.

# UNIT 14.5.7: Risk Appetite & Resilience

# - Unit Objectives | 🎯



At the end of this unit, participants will be able to:

- Discuss the relationship between entrepreneurship and risk appetite
- Discuss the relationship between entrepreneurship and resilience
- Describe the characteristics of a resilient entrepreneur

#### -Resources to be Used



- Participant Handbook
- Chart papers
- Blank sheets of paper
- Pens
- Marker pens

#### Ask



- Can you define risk or explain what constitutes a risk?
- What do you people mean when they say, "This may be a risky proposition"?
- What risks are they talking about?

# -Example 💝



• Let's have a look at these two examples:

Rohit and his family were travelling by car from Delhi to Nainital. It was their second trip there. Rohit was familiar with the road. His friends told him that the highway after Rampur was in a bad condition. They advised him to take a shortcut and turn left from Moradabad and take the Kaladhungi road. This road is in a better condition.

Since he was going with his family, and did want take the risk of getting lost, he left early. He took the Kaladhungi road and reached Nainital well in time.

Suresh and his family too were travelling by car from Delhi to Nainital. It was their second trip there. His friends too advised him to take a shortcut and turn left from Moradabad and take the Kaladhungi road as this road was in a better condition.

Suresh too decided to take the Kaladhungi road but he left Delhi in the afternoon. It was dark by the time he reached Kaladhungi, and he was sure that he was taking the correct turn. As it was late, he could not find anyone to give him directions. He ended up being in an unknown place that was scarcely inhabited.



- Let's see what type of risks Rohit and Suresh took.
- Discuss 'Risk Appetite and Resilience' with the participants as given in the Participant Handbook.



Let's learn more about risk appetite and resilience with the help of an activity.

# Team Activity



#### **Risk Appetite**

- This is a group activity.
  - In the previous unit, you read success stories of Mr Dhirubhai Ambani and Dr Karsanbhai Patel.
  - Mr Ambani left his job and started his company Reliance with just Rs. 50,000/-.
  - Dr Patel kept his job, went door-to-door to sell Nirma, and only when the brand started gaining popularity did he start his own company.
  - What types of risk did both of them take?
  - What risk factors, do you think, did they keep in mind before launching their company?
  - Write the Risk Appetite Statement of both the companies.

#### **Activity De-brief**

- Who took a greater risk?
- What are the differences between the Risk Appetite Statement of both the companies?

# Do



- Instruct the participants that this is group work.
- Divide the class into small groups of 4.
- Give each group a chart paper.
- Tell the participants that they have to evaluate the risks taken by Mr Dhirubhai Ambani and Dr Karsanbhai Patel.
- Give the participants 15 minutes to discuss and write.
- Keep a check on time. Tell the group to wind up quickly if they go beyond the given time limit.

#### Ask



- Do you think all entrepreneurial ventures are successful?
- What happens if the first venture is not successful?
- Should the entrepreneur stop when faced with challenges or face them?

# -Example



Let's have a look at the following example:

Vijay Shekhar Sharma is the founder of Paytm, which is a giant Indian e-commerce. He was born in a middleclass family in Uttar Pradesh. He started his first job at an MNC. He quit after six months and built a company One97 with his friends. As One97 grew bigger, it needed more money because it was running more servers, bigger teams, and had to pay royalty. At that time, the tech bubble popped and technology companies were running in losses. Finally, money ran out. So One97 took loans and then more loans at higher rates of interest, as high as 24 per cent, and became caught in a vicious cycle.

In 2014, Paytm was launched with online wallet services after which, the company enabled online payment transactions. The company got licenses from RBI in 2016 to launch India's first ever payment bank. Moreover, the main motive of Paytm was to transform India into a cashless economy.

After demonetization came into effect, Vijay Shekhar Sharma started promoting online and digital transactions to deal with the cash crunch. In fact, the service of the company's mobile wallet is accepted across India. The logo of Paytm is now popular almost everywhere from tea stalls to major companies.

- Let's see what qualities made Vijay Shekhar Sharma a resilient entrepreneur.
- Discuss Entrepreneurship and Resilience with the participants as given in the Participant Handbook.

# Say



Let's learn more about entrepreneurship and resilience with the help of an activity.

# Team Activity



#### **Entrepreneurship and Resilience**

- This is a group activity.
  - Think of some entrepreneurship ventures that faced challenging times, but later resulted in success stories.
  - Who is the founder of that company?
  - What challenging times did it face?
  - How did it overcome those challenges?
  - List the resilient characteristics of the entrepreneur.

#### **Activity De-brief**

- Each group to give their presentation.
- Why did you choose this company?
- What is the success story of the company?



- Instruct the participants that this is group work.
- Divide the class into small groups of 4.
- Give each group a chart paper.
- Tell the participants that they have to think of an entrepreneur who faced challenging times, but eventually succeeded.
- Give the participants 15 minutes to discuss and write.
- Keep a check on time. Tell the group to wind up quickly if they go beyond the given time limit.

# Summarize 📜



- You can summarize the key points of the unit.
- Ask the participants what they learned from the activities.
- Clarify any questions or doubts they might have.

#### UNIT 14.5.8: Success and Failures

# -Unit Objectives 🏻 🎯



At the end of this unit, participants will be able to:

Discuss how to deal with failure

# Resources to be Used



Participant Handbook

#### -Ask



- Have you heard the quote 'nothing is impossible'?
- What do you think it means?
- Do you think that all successful entrepreneurs became famous overnight or did they have to struggle or face failure before succeeding?

# -Example 🛭 🗬



Let's have a look at this example.

Shah Rukh Khan, also known as, SRK or King Khan is a force to reckon with. Did he achieve stardom overnight? Shah Rukh Khan, who has seen many struggles in his life - he has slept on streets, struggled to support himself and his sister at a very young age, and lost his parents very early in life, which led to his sister seeking mental health support. Amidst all the chaos and challenges, he kept pushing himself, and today he stands tall as the 'Badshah of Bollywood'. Certainly those years were not easy for him.

When he was young, he stood at Marine Drive and said, "I will rule this city one day". Failure was not just his companion during or before his stardom, it is still a substantial part of his life. Success does not come easy. What made him a star was his acceptance of failure and the urge to improve.



- How do you define success and failure?
- What is fear?
- Discuss "success and failure" with the participants as given in the Participant Handbook.

# Ask



- Have you felt or experienced fear?
- What led you to feel that emotion?
- How did you handle it?



Let's learn the about success and failure with the help of an activity.

# Team Activity

- Divide the class into groups of four.
- Instruct them to think of one scenario where they have to interview a successful entrepreneur.
- Explain the purpose and duration of the activity.
- Set guidelines pertaining to discipline and expected tasks.
- They have to choose one person from the group as the interviewee and one as the interviewer.
- Go around and make sure they have understood what is to be done and are discussing the roles properly.
- Check that everyone understands their role. Give clarifications if needed. Give the participants about 5 minutes to discuss and decide their roles.
- Ask the groups to stop the discussion as soon as the time is over.
- Invite each group one by one to come and present their interview as a role play.

#### - Notes for Facilitation



#### **Facilitating Role Plays**

#### Preparing for the activity

- 1. Carefully review the details of the scenario and the character descriptions.
- 2. Become familiar with the key issues being addressed in the scenario.
- 3. Study the provided material so that you are ready to address issues related to the situations depicted in the role plays.
- 4. Anticipate potential questions that might be raised by the participants and be ready to address them.

#### Conducting the activity

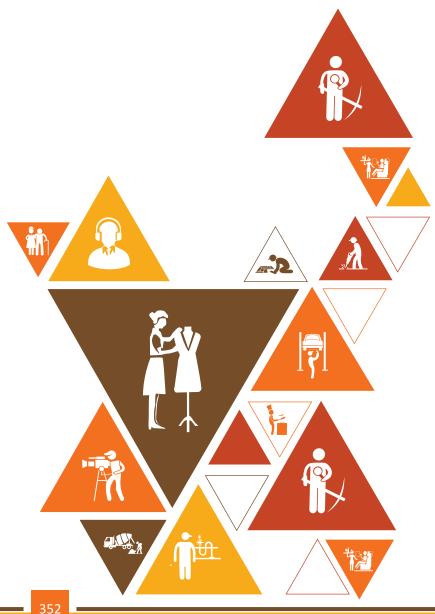
- 1. Introduce the activity. Emphasize that role playing provides participants with an opportunity to apply their new knowledge, skills, and tools in situations that simulate actual interactions with customers.
- 2. Ask participants to form pairs. Direct the members of each group to choose who will play the roles. Remind the groups that each participant should be given the opportunity to play/practice the different roles.
- 3. Conduct a demonstration so that participants become familiar with the expectations related to the roles and support materials.
- 4. To maintain spontaneity of the interactions during the role play, ask the participants not to discuss the details of their roles prior to the role play.
- 5. Give the pairs 15-20 minutes to conduct the role play.
- 6. Circulate among the groups to answer any questions that may arise and provide guidance as needed.
- 7. After all the pairs have finished with the role play, conduct a de-briefing session on each role play.
- 8. Ask the groups to take five minutes to talk about what happened during the role play. The groups should discuss the questions given in the de-briefing for each role play. Encourage participants to provide constructive criticism during their discussions.
- 9. Conclude the activity by asking participants to think about whether and how they might use scripted role plays in their real life.

# Summarize



• Wrap the unit up after summarizing the key points and answering questions.

Notes 📋 ———		
Notes 📋		



# UNIT 14.6: Preparing to be an Entrepreneur

# **Key Learning Outcomes**



#### At the end of this unit, participants will be able to:

- 1. Discuss how market research is carried out
- 2. Describe the 4 Ps of marketing
- 3. Discuss the importance of idea generation
- 4. Recall basic business terminology
- 5. Discuss the need for CRM
- 6. Discuss the benefits of CRM
- 7. Discuss the need for networking
- 8. Discuss the benefits of networking
- 9. Discuss the importance of setting goals
- 10. Differentiate between short-term, medium-term and long-term goals
- 11. Discuss how to write a business plan
- 12. Explain the financial planning process
- 13. Discuss ways to manage your risk
- 14. Describe the procedure and formalities for applying for bank finance
- 15. Discuss how to manage their own enterprise
- 16. List the important questions that every entrepreneur should ask before starting an enterprise

# UNIT 14.6.1: Market Study/ The 4Ps of Marketing/ Importance of an IDEA: Understanding Market Research

## - Unit Objectives



At the end of this unit, participants will be able to:

- Discuss how market research is carried out
- Describe the 4 Ps of marketing
- Discuss the importance of idea generation

#### Resources to be Used



- Participant Handbook
- Chart papers
- Markers pens
- · Blank sheets of paper

#### Ask



- Suppose, you want to open a restaurant, what are the factors you will consider?
- How will you promote your restaurant?

## Example 🗣



• Let's have a look at this example.

Arjun was an MBA working in a company. But he wanted to start a low cost budget hostel for foreign tourists coming to India. He did a lot or market research before starting the project. Based on the information he gathered, he made his business plan. His hostel is now flourishing and he is thinking of expanding to other tourist destinations.

#### Say



- Discuss "Market Study" with the participants. Refer to the Participant Handbook.
- Let's learn about market study and research with the help of an activity.

#### Team Activity



#### **Market Study**

- · This is a group activity.
- You want to start your own tuition centre.
- What type of research will you do?

#### **Activity De-brief**

- Ask each group to come forward and give a brief presentation.
- Encourage other groups to be interactive and ask questions.
- What factors did you keep in mind while doing your research?
- Based on our research would you go ahead and open a tuition centre?

#### Do



- Instruct the participants that this is group work.
- Divide the class into small groups of 4 or 6.
- Give each group a chart paper.
- Tell the participants that they have to start their own tuition centre.
- Give the participants 10 minutes to discuss and write the research work they need to do.
- Keep a check on time. Tell the group to wind up quickly if they go beyond the given time limit.

## Say



• By opening a tuition centre you are offering a service.

#### Ask



• What factors will you keep in mind before opening it?

#### Say



• Discuss "The 4Ps of Marketing" with the participants as given in the Participant Handbook.

## Say



Let's learn about the 4Ps of Marketing with the help of an activity.

### Team Activity



#### 4 Ps of Marketing

- This is a group activity.
- · You have to sell a pen to four different segments:
  - 1. Rural villagers
  - 2. Rural middle class
  - 3. Urban middle class
  - 4. Upper end rich people (Niche market)

Keeping the 4Ps of Marketing in mind, what marketing strategy will you design to sell the pen?

#### **Activity De-brief**

- Ask each group to to present their strategy.
- Encourage other groups to be interactive and ask questions.

#### Do



- Instruct the participants that this is group work.
- Divide the class into four groups.
- Give each group a chart paper.
- Assign each group a target audience for selling the pens:
  - 1. Rural villagers
  - 2. Rural middle class
  - 3. Urban middle class

- 4. Upper end rich people
- Tell the participants that they have to design a marketing strategy keeping the 4Ps of Marketing in mind.
- Give the participants 20 minutes to discuss and come up with their strategy.
- Keep a check on time. Tell the group to wind up quickly if they go beyond the given time limit

#### **Activity De-brief**

- Ask each group to come forward and give a brief presentation.
- Ask each group what they kept in mind while designing their marketing strategy.
- Encourage other groups to be interactive and ask questions.



- Each entrepreneur has an idea of wants he wants to sell. It may be a service or a product.
- Discuss "Importance of an IDEA" as given in the Participant Handbook.

## Summarize | 📜



- Summarize the key points of the unit.
- Ask the participants what they learnt from the activities.
- Encourage them to ask if they have any doubts.

## **UNIT 14.6.2: Business Entity Concepts**

# - Unit Objectives



At the end of this unit, participants will be able to:

Recall basic business terminology

## -Resources to be Used



Participant Handbook

#### Say



- Let's recall some basic business terminology.
- Discuss the Business Entity Concepts as given in the Participant Handbook.
- Let's learn some basic business terminology by having an activity.
- We will have a quiz today.

## Activity



The activity is a quiz.

## Do



- Divide the class in two groups and give a name to each group.
- Explain the rules of the quiz. For each correct answer the group gets 1 mark.
- If the group is unable to answer the question is passed to the next group.
- Explain the purpose and duration of the activity.
- Ask the questions of the quiz.
- Keep a score of the groups.
- Set guidelines pertaining to discipline and expected tasks.

## Summarize | 📜



• Summarize the unit by discussing the key points.

#### **Notes for Facilitation**



#### **QUESTIONS FOR THE QUIZ**

1. What does B2B mean?

**Business** to business

2. What is a financial report?

A comprehensive account of a business' transactions and expenses

3. Who is a sales prospect?

A potential customer

4. How is working capital calculated?

Current assets minus current liabilities

5. What is an estimation of the overall worth of a business called?

**Valuation** 

6. You are buying a house. What type of transaction is it?

Complex transaction

7. How will you calculate the net income?

Revenue minus expenses

8. How is Return on Investment expressed?

As percentage

9. How will you calculate the cost of goods sold?

Cost of materials minus cost of outputs

10. What is revenue?

Total amount of income before expenses are subtracted.

11. What is a Break-Even Point?

This is the point at which the company will not make a profit or a loss. The total cost and total revenues are equal.

12. What is the formula used to calculate simple interest?

A = P(1 + rt); R = r \* 100

13. What are the three types of business transactions?

Simple, Complex and Ongoing Transactions

14. The degrading value of an asset over time is known as

Depreciation

15. What are the two main types of capital?

**Debt and Equity** 

## UNIT 14.6.3: CRM & Networking

## Unit Objectives | @



At the end of this unit, participants will be able to:

- · Discuss the need for CRM
- Discuss the benefits of CRM
- Discuss the need for networking
- Discuss the benefits of networking

# Resources to be Used |



Participant Handbook

#### Ask



- Can your business run without customers/buyers?
- Who is the most important entity in any business?



- The key to every success business lies on understanding the customer's expectations and providing excellent customer service.
- Discuss about CRM and its benefits. Refer to the Participant Handbook.
- Providing excellent customer service entails:
  - Treating your customers with respect.
  - Be available as per their need/schedule.
  - Handling complaints effectively.
  - Building long lasting relationships.
  - Collecting regular feedback.
- Handle customer complaints proactively. Ask "what happened", "why it happened", "how can it be avoided next time", etc.
- Collecting feedback from the customers regularly will enable you to improve your good/service.
- "Let's understand it better with the help of some case scenarios. You will be given some cases within your groups. You have to analyse the case scenario that has been given to you and then find an appropriate solution to the problem."

#### Do



- Divide the class into four groups of maximum six participants depending on the batch size.
- Give one case study to each group.
- Instruct them to read the case carefully.
- The group is expected to analyse and discuss the case amongst them and find a solution to the given problem.
- Put down the discussion points (de-brief questions) on the board. Give the class 5-10 minutes to discuss the case and note down their solutions.
- At the end of 10 minutes, the team should present their case solution to the class.

#### Team Activity



#### **Case Study Analysis**

Raju runs a business of wooden furniture. He has a huge list of customers on Facebook and WhatsApp who give him orders regularly. Ankita is one of his old and regular customers. She placed an order for a new chester and TV cabinet via WhatsApp and requested Raju to send them as soon as possible. When the parcel reached Ankita through courier she found that chester was broken and the TV unit was chipped from the bottom. Ankita was heartbroken. It was a complete waste of money. She sent a message to Raju on WhatsApp, expressing her anger and disappointment. Raju might lose an old customer forever if he doesn't satisfy the customer. What should Raju do to retain his customer?

#### Scenario 2

Rajni runs a boutique shop. She sells suits and sarees. She is one of the most successful designer in her city. Rajni swears that all the clothes in her boutique have unique designs. Smita has to attend her cousin's wedding; she goes to Rajni's boutique to buy a saree. Smita wanted a unique designer saree. Rajni customized a saree for her and sent it over the courier. When Smita had a look at the saree she realised her two friends had the same design sarees. She sent a message to Rajni on WhatsApp, expressing her anger and disappointment. Did Rajni make a false promise? Were her designs copied? What could happen to Rajni's image after this incident? What would you do if you were in Rajni's place?

#### Scenario 3

Shama is a beautician who offers parlour services to ladies by making home visits. Recently, Shama got her name registered on an e-commerce website. Two days earlier, she got a message from Mrs Sushma. The appointment was fixed for next day, 11:00 am and the remuneration for the services was decided beforehand. When Shama reached there at 10:50 am, Mrs Sushma was not at home. When Shama called her, she asked her to wait for a while. Mrs Sushma reached home at 11:45 am. Meanwhile, Shama had to reschedule her next appointment. After availing Shama's services, Mrs Sushma refused to pay the requisite amount and started finding faults in the services provided by her. Who was at fault in this scenario? What should you do in case the customer behaves unreasonably? What would you do if you were in Shama's place?

#### Scenario 4

Shailender is the manager of a car showroom. He proactively takes part in all the transactions that happen in his showroom. Vinita wants to buy a new car. She has chosen a car from Shailender's showroom. The salesperson has given her a very good discount and has also promised free service for one year. Vinita goes to the showroom and asks to complete all the formalities to purchase the car. When she sees the final bill she realize that she has not received the promised discount neither was there any mention of the free services. She immediately demands to see the Shailender. When Shailender's head asks how much discount Vinita was promised, he realised the discount will make the sale in loss. The car showroom owner might lose a customer and deal due to false commitments made by his manager. Besides, the customer might tell this to other people, creating a bad name and image for the showroom. If you owned that showroom, how would you have convinced your customer?



- Now, let's discuss the problem and solution with the class.
- The group will first briefly describe the case to the class.
- Then discuss the issue identified and the proposed solution.
- Present the solution as a role play.
- Post presentation, the other groups may ask questions from the group that has presented.

## Do



- Congratulate each group for the presentation/role play.
- Ask the audience to applaud for them.
- Keep a check on time. Tell the group to wind up the discussion quickly if they go beyond the given time limit.

#### Say



- If your customers are happy with you they will give referrals which will help to grow your business.
- One more way of growing business is 'Networking'.
- Discuss Networking and its benefits. Refer to the Participant Handbook.

#### **Activity**



#### **Group Discussion**

• Conduct a group discussion in the class on how they can do networking for their business.

#### Summarize | **2**



- Ask the participants what they have learnt from this exercise/ activity.
- · Ask if they have any questions related to what they have talked about so far.
- Close the discussion by summarizing the importance of CRM and Networking for entrepreneurs.
- Close the discussion by summarizing the importance of CRM and Networking for entrepreneurs.

# UNIT 14.6.4: Business Plan: Why Set Goals?

## **Unit Objectives**



At the end of this unit, participants will be able to:

- Discuss the importance of setting goals
- · Differentiate between short-term, medium-term and long-term goals
- Discuss how to write a business plan
- Explain the financial planning process
- · Discuss ways to manage your risk

#### Resources to be Used



- · Participant Handbook
- · Chart papers
- · Blank papers
- Marker pens
- Ruler

#### Ask



- Remember we had written SMART Goals in a previous session? Let's try and recall why it is important to set goals?
- While framing SMART goals, we talked about 'T' in SMART, which was 'Time Bound'? What do we mean by time bound goals?
- What time limit did you set for your goal- 3 weeks, 3 years, 10 years?

#### Say



• Talk about short term, long term and medium term goals, as discussed in the Participant Handbook.

#### Ask



• As you are planning to become an entrepreneur, you must have thought of an idea for a start-up. What is your business idea?

#### Do



• Ask few participants to share their business ideas.

#### Ask



- Have you created a business plan for your business idea?
- Do you think it is important to have a business plan in place? Why/ why not?

#### Say



- Talk about 'Why Create a Business Plan' as discussed in the Participant Handbook.
- Let's understand it better with the help of an activity.

# Team Activity

#### Writing a business Plan

- This is a group activity.
- Give the groups the required resources such as chart paper and markers.
- This activity is divided into two parts:
  - 1. Create a business idea
  - 2. Develop a business plan
- The group will discuss and come up with a new business idea and present their idea to the class.
- In the second part of the activity the group will develop a business plan for the business idea.
- The business plan prepared will be presented by the groups to the class.

MY BUSINESS PLAN
Executive Summary: What is your Mission Statement?
Business Description: What is the nature of your business?
Market Analysis: What is your target market?
Organization and Management: What is your company's organizational structure?
Service or Product Line: What is the lifecycle of your product/ service?
Marketing and Sales: How will you advertise and sell your products?
Funding Request: How much fund is required and from where?

## Say |



- Teams will need to brainstorm for this part of the activity.
- Use the blank papers for the second part of this activity
- Make your business plan on a chart paper based on the following parameters:
  - 1. Executive Summary
  - 2. Business Description
  - 3. Market Analysis
  - 4. Organization and Management
  - 5. Service or Product Line
  - 6. Marketing and Sales
- Explain each parameter in detail as done in the Participant Handbook.
- Discuss each parameter with the business idea examples of the groups.
- Groups will discuss and develop the business plan for their business idea.

#### Say



- Now, let's share our plan with the class.
- Each group will briefly describe the plan to the class.
- Post presentation, the other groups may ask questions to the group who have presented their plan.

#### Do



- Congratulate each group for sharing their points.
- Ask the audience to applaud for them.
- Keep a check on time. Tell group to wind up the discussion quickly if they go beyond the given time limit.

#### Say



- Along with a business plan, you need to create a financial plan and evaluate the risk involved with your start up.
- Discuss 'Financial Planning' and 'Risk Management' in detail as given in the Participant Handbook.

#### Summarize |



- Ask the participants what they have learnt from this exercise/ activity.
- Ask if they have any questions related to what they have talked about so far.

#### - Notes for Facilitation



Keep the business plan format ready in a flipchart to display it during the activity.

#### UNIT 14.6.5: Procedures and Formalities for Bank Finance

## **Unit Objectives**



At the end of this unit, participants will be able to:

Describe the procedure and formalities for applying for bank finance

#### Resources to be Used



- Participant Handbook
- · Bank loan/finance form sample

#### Ask



• While preparing a business plan in the last session, we discussed financial planning to arrange financial resources for your start-up. Therefore, how will you collect funds to start your business?

#### Say



- While most entrepreneurs think 'product' is the most difficult thing to decide for a business, start-up capital poses an even a bigger obstacle. Though there are various ways of funding the business, to convince investors to invest money is the most challenging.
- Some of the funding options available in India are:
  - Bootstrapping: Also called self-financing is the easiest way of financing
  - Crowd funding: Funds are collected by consumers pre-ordering or donating for starting the business.
  - Angel investors: Individual or group of investors investing in the company
  - **Venture capitalists**: Venture capitals are professionally managed funds who invest in companies that have huge potential. They usually invest in a business against equity.
  - Bank loans: The most popular method in India.
  - Microfinance Providers or NBFCs
  - Government programmes
- Let us know discuss the most popular method i.e. bank finance in detail here.

## Do



- Discuss the list of documents that are required to apply for a loan like letter of introduction, business brochure, references of other banks, and financial statements.
- Explain the details to be filled in a loan application form.
- Divide the class into groups. Give each group a loan application form.
- Ask the groups to discuss and fill the form.

#### Summarize



- Close the discussion by summarizing the important documents needed for bank loan.
- Ask the participants if they have any questions related to what they have talked about so far.

# **Notes for Facilitation**

(in case of partnership firm)



- Checklist of documents is provided as resources for the session.
- You can make some copies and distribute it during the group activity.
- Download sample loan application forms from any nationalised bank's website. Print sufficient copies to circulate it amongst the groups.

# CHECKLIST OF DOCUMENTS TO BE SUBMITTED ALONG WITH LOAN APPLICATION (Common for all banks) 1. Audited financial statements of the business concern for the last three years 2. Provisional financial statements for the half – year ended on 3. Audited financial statements of associate concern/s for the last three years 4. Copy of QIS II for the previous guarter ended on 5. Operational details in Annexure I 6. CMA data for the last three years, estimates for current year and projection for the next year 7. Term loan/DPG requirements in Annexure II 8. List of machinery in respect of machinery offered as security in Annexure III 9. Additional details for export advances furnished in Annexure IV 10. Property statements of all directors/partners/proprietor/guarantors 11. Copies of ITAO of the company for the last three years 12. Copies of ITAOs/WTAOs of the directors/partners/proprietor and guarantors 13. Copies of certificate from banks and financial institutions certifying the latest liability with them 14. Copy of board resolution authorizing the company to apply to your bank for the credit facilities mentioned in application

15. Copy of memorandum and article of association (in case of limited company)/partnership deed

16. Cash budget for the current year and next year in case of contractors and seasonal industries

# UNIT 14.6.6: Enterprise Management – An Overview: How to Manage Your Enterprise?

## - Unit Objectives



At the end of this unit, participants will be able to:

• Discuss how to manage their own enterprise

#### -Resources to be Used



· Participant Handbook

#### Ask



- Having set-up a business, do you think it is possible to do everything on your own?
- Does one require trained persons for help?
- What does management mean?

#### Say



Let's have a look at this example:

Kapil had a small business that was beginning to pick up pace. He wanted to expand his business, and therefore employed few more people. One day, as he was walking past Ramesh, one of his new employees, he overheard Ramesh talking rudely to a customer on the phone. This set him thinking. Kapil realised that he should have regular team meetings to motivate his employees and speak with them about any problems they might be facing during work. He should also conduct training sessions on new practices, soft skills, and technology, and develop work ethics manual for managing his enterprise.

#### Say



- Was Kapil correct in his approach or he should have scolded Ramesh instantly in front of his other employees?
- Discuss "Enterprise Management An Overview" with the participants as given in the Participant Handbook.

#### Say



• Let's learn how to effectively manage an enterprise or business through an activity.

#### Team Activity



#### **Enterprise Management**

- This is a group activity.
- Design a matrix listing the topics and key words that are needed to run an enterprise effectively and smoothly.

#### **Activity De-brief**

- Have each group present their matrix.
- Encourage participants of the other groups to ask question about each other's presentation.

- Instruct the participants that this is group work.
- Divide the class into small groups of 4.
- Give each group a chart paper and coloured pen.
- Tell the participants that they have make a matrix they need to fill.
- They have to write the main topics and key words that will them effectively manage their enterprise.
- Give the participants 15 minutes to discuss and write.
- Keep a check on time. Tell the group to wind up quickly if they go beyond the given time limit.

# Summarize | 📜



- Ask the participants what they have learned from this exercise/activity.
- Ask if they have any questions related to what they have talked about so far.
- Close the discussion by summarizing the importance of effective management to run an enterprise as given in the Participant Handbook.

# UNIT 14.6.7: 20 Questions to Ask Yourself before Considering Entrepreneurship

#### Unit Objectives



At the end of this unit, participants will be able to:

• List the important questions that every entrepreneur should ask before starting an enterprise

#### Resources to be Used



- Participant Handbook
- Blank sheets of paper
- Pens

#### Ask



· Why do you want to become an entrepreneur?

#### Say



- It is very important to know why you want to become an entrepreneur. Your personal goals for becoming an entrepreneur play a key role in the success of your business. Your goals should be clear well before you start your business.
- Apart from the goals, the other aspects of business that you need to bear in mind are the potential problems that you may face to set-up, your areas of interest, and all the other dimensions of the business.
- Let's understand it better with the help of some questions that every entrepreneur should ask before starting their own business.
- Open the Participant Handbook section named '20 Questions to Ask Yourself Before Considering Entrepreneurship'. You have to answer the questions individually.
- Then, we will have a class discussion on all the questions.

#### Do



- Read out the questions one by one in front of all the participants.
- Participants have to answer all the one by one questions.
- Give the class 10-15 minutes to note down their answers.
- At the end of 15 minutes, open the discussion for all the questions.
- Moderate the discussion by focusing on the relevant points.
- Keep a check on time and don't let the discussion get sabotaged or lose track of time. Ensure all the questions are covered and discussed.

#### Summarize



- Ask the participants what they have learned from this exercise/activity.
- Ask if they have any questions related to what they have talked about so far.

Notes 📋 -			









# 15. Annexures

Annexure I: Training Delivery Plan
Annexure II: Assessment Criteria



# Annexure I

Training Delivery Plan						
Program Name:	Retail Trainee Associate					
Qualification Pack Name & Ref. ID	Retail Trainee Associate - RAS/Q0103					
Version No.	1.0	Version Update Date	27/6/2016			
Pre-requisites to Training	10th Pass, 0-1 year in a similar position (r	not mandatory)				
Training Outcomes	By the end of this program, the participal	nts will be able to:				
	1. To display stock to promote sales					
	2. To plan and prepare visual merchandis	ing displays				
	3. To dress visual merchandising displays					
	4. To dismantle and store visual merchan	dising displays				
	5. To prepare products for sale					
	6. To promote loyalty schemes to custom	ers				
	7. To keep the store secure					
	8. To maintain health and safety					
	9. To keep the store clean and hygienic					
	10. To provide information and advice to	customers				
	11. To create a positive image of self & or	ganisation in the custome	ers mind			
	12. To work effectively in a Retail team					

S. No.	Module	Session Name	Session Objectives	NOS Reference	Methodology	Training Tools/Aids	Duration
1	Introduction	Icebreaker	<ul> <li>Introduce each other</li> <li>Build rapport with fellow students and the facilitator</li> </ul>	NA	Group Activity	Available objects such as paper, pencil, etc.	1 hour
2	Retail Sector	Types of organisations and job roles	<ul> <li>Overview of Retail Industry in India</li> <li>Overview of Trainee Associate</li> <li>Career Progression of a Trainee Associate</li> </ul>	NA	Facilitator-led discussion, videos	White board/ Marker/ Powerpoint/ Videos, Laptop	2 hours
3	To display stock to promote sales	Stock Display	<ul> <li>Define stock display</li> <li>Understand importance of good stock display in retail stores</li> <li>Identify various effective display techniques for retail stores</li> <li>Understand the factors that determine display requirements</li> </ul>	RAS/ NO105 PC1, PC2, PC3, PC4, KA1, KA2	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
		Stock Display: Skill Practice	<ul> <li>Define stock display</li> <li>Understand importance of good stock display in retail stores</li> <li>Identify various effective display techniques for retail stores</li> <li>Understand the factors that determine display requirements</li> </ul>	RAS/ NO105 PC1, PC2, PC3, PC4, KA1, KA2	Team Activity		1 Hour

Proper Setup for Retail Displays	<ul> <li>Distinguish how organised displays are better than unorganised displays</li> <li>Analyse the theme or look of a retail store</li> <li>Distinguish between permanent and movable displays</li> <li>Recognise importance of keeping displays fresh</li> <li>Identify store layout strategies</li> </ul>	RAS/ NO105 PC2, PC4, PC6, PC7, PC8, KA2	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
Proper Setup for Retail Displays: Skill Practice	<ul> <li>Distinguish how organised displays are better than unorganised displays</li> <li>Analyse the theme or look of a retail store</li> <li>Distinguish between permanent and movable displays</li> <li>Recognise importance of keeping displays fresh</li> <li>Identify store layout strategies</li> </ul>	RAS/ NO105 PC2, PC4, PC6, PC7, PC8, KA2	Field visit	Pen & note pad	4 Hours
Proper Setup for Retail Displays: Skill Practice	<ul> <li>Distinguish how organised displays are better than unorganised displays</li> <li>Analyse the theme or look of a retail store</li> <li>Distinguish between permanent and movable displays</li> <li>Recognise importance of keeping displays fresh</li> <li>Identify store layout strategies</li> </ul>	RAS/ NO105 PC2, PC4, PC6, PC7, PC8, KA2	Team Activity	Pencil and paper	1 Hour
Proper Setup for Retail Displays: Skill Practice	<ul> <li>Distinguish how organised displays are better than unorganised displays</li> <li>Analyse the theme or look of a retail store</li> <li>Distinguish between permanent and movable displays</li> <li>Recognise importance of keeping displays fresh</li> <li>Identify store layout strategies</li> </ul>	RAS/ NO105 PC2, PC4, PC6, PC7, PC8, KA2	Activity	Pencil, paper, computer with internet connection	0.5 Hour
Determining Display Requirements Using Store Procedures	Recognise store procedures that can allow retailers to determine their display requirements     Explain the steps to prepare stock displays     List elements of effective visual merchandising	RAS/ NO105 PC1, PC2, PC3, PC4, PC5, KA1, KA2	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
Determining Display Requirements Using Store Procedures: Skill Practice	<ul> <li>Recognise store procedures that can allow retailers to determine their display requirements</li> <li>Explain the steps to prepare stock displays</li> <li>List elements of effective visual merchandising</li> </ul>	RAS/ NO105 PC1, PC2, PC3, PC4, PC5, KA1, KA2	Team Activity	Pencil and paper	1 Hour

Legal and Statutory Requirements for Stock Display	<ul> <li>Define list of stock requirements</li> <li>Analyse stock and custom point-of-purchase display options</li> <li>Explain legal and statutory requirements for stock display</li> <li>Identify components of successful small retail businesses</li> </ul>	RAS/ NO105 PC1, KA3	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
Legal and Statutory Requirements for Stock Display: Skill Practice	<ul> <li>Define list of stock requirements</li> <li>Analyse stock and custom point-of-purchase display options</li> <li>Explain legal and statutory requirements for stock display</li> <li>Identify components of successful small retail businesses</li> </ul>	RAS/ NO105	Activity	Retail Products, Pencil and paper	2 Hours
Importance of Labelling Materials and Equipment	<ul> <li>Understand the importance of labelling materials and equipment</li> <li>Identify different retail labelling solutions</li> <li>List guidelines for product labelling</li> <li>Justify use of labelling systems in retail environment</li> </ul>	RAS/ NO105 PC9, PC10, PC11, PC12, PC13, PC14, KB2	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
Importance of Labelling Materials and Equipment: SI Practice	<ul> <li>Understand the importance of labelling materials and equipment</li> <li>Identify different retail labelling solutions</li> <li>List guidelines for product labelling</li> <li>Justify use of labelling systems in retail environment</li> </ul>	RAS/ NO105 PC9, PC10, PC11, PC12, PC13, PC14, KB2	Practical	Sample product	1 Hour
Importance of Labelling Materials and Equipment: SI Practice	Understand the importance of labelling materials and equipment Identify different retail labelling solutions List guidelines for product labelling Justify use of labelling systems in retail environment	RAS/ NO105 PC9, PC10, PC11, PC12, PC13, PC14, KB2	Role Play		3 Hours
Excess Materi and Equipmer		RAS/ NO105 PC6, PC8, KB1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours

4	Planning and Prepar- ing Visual Merchan- dising Displays	Understanding Visual Design	<ul> <li>Explain visual design</li> <li>Explain visual design policies for retail stores</li> <li>Define visual design brief</li> <li>List basic elements of visual design</li> </ul>	RAS/ NO106 KA1, KA2, KA4	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
		Understanding Visual Design: Skill Practice	<ul> <li>Explain visual design</li> <li>Explain visual design policies for retail stores</li> <li>Define visual design brief</li> <li>List basic elements of visual design</li> </ul>	RAS/ NO106 KA1, KA2, KA4	Team Activity	Pencil and paper	0.5 Hour
		Finding Out the Display Needs for Framing a Design Brief	<ul> <li>Explain the basis of a design brief</li> <li>Analyse how to maintain visual appeal of the store</li> <li>Discuss principles of creating a visual design</li> <li>Prepare design brief to identify stock to be displayed</li> </ul>	RAS/ NO106 PC1, PC2, PC3, PC6, KA3, KA6	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
		Finding Out the Display Needs for Framing a Design Brief: Skill Practice	<ul> <li>Explain the basis of a design brief</li> <li>Analyse how to maintain visual appeal of the store</li> <li>Discuss principles of creating a visual design</li> <li>Prepare design brief to identify stock to be displayed</li> </ul>	RAS/ NO106 PC1, PC2, PC3, PC6, KA3, KA6	Team Activity	Pencil and paper	0.5 Hour
		Role of Visual Display in Marketing, Sales and Promotional Campaigns	<ul> <li>Demonstrate the role of visual display in marketing</li> <li>Explain about visual display promotional campaigns</li> <li>Recognise what influences customers' behaviour</li> <li>List visual elements that create a good impression on shoppers</li> </ul>	RAS/ NO106 PC4, PC5, KA1, KB1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Role of Visual Display in Marketing, Sales and Promotional Campaigns: Skill Practice	<ul> <li>Demonstrate the role of visual display in marketing</li> <li>Explain about visual display promotional campaigns</li> <li>Recognise what influences customers' behaviour</li> <li>List visual elements that create a good impression on shoppers</li> </ul>	RAS/ NO106 PC4, PC5, KA1, KB1	Field Visit	Pen & note pad	3 Hours
		Identifying and Contacting a Visual Merchandiser	<ul> <li>Discuss the role of a visual merchandiser</li> <li>Evaluate overall colour schemes of merchandising</li> </ul>	RAS/ NO106 PC6, KB1, KB3	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Identifying and Contacting a Visual Merchandiser: Skill Practice	<ul> <li>Discuss the role of a visual merchandiser</li> <li>Evaluate overall colour schemes of merchandising</li> </ul>	RAS/ NO106 PC6, KB1, KB3	Activity	Participant Handbook, pencil	0.5 Hour

			1	1	
Arranging and Monitoring Merchandise Delivery and Updating Stock Records: Skill Practice	<ul> <li>Manage merchandise delivery</li> <li>Explain how to arrange and receive merchandise delivery</li> <li>Discuss ways to monitor progress of merchandise delivery</li> <li>List advantages of updating stock records</li> </ul>	RAS/ NO106 PC7, PC8, PC9, KA7, KA8, KA9	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
Arranging and Monitoring Merchandise Delivery and Updating Stock Records: Skill Practice	<ul> <li>Manage merchandise delivery</li> <li>Explain how to arrange and receive merchandise delivery</li> <li>Discuss ways to monitor progress of merchandise delivery</li> <li>List advantages of updating stock records</li> </ul>	RAS/ NO106 PC7, PC8, PC9, KA7, KA8, KA9	Field Visit	Pen & note pad	3 Hours
Arranging and Monitoring Merchandise Delivery and Updating Stock Records: Skill Practice	<ul> <li>Manage merchandise delivery</li> <li>Explain how to arrange and receive merchandise delivery</li> <li>Discuss ways to monitor progress of merchandise delivery</li> <li>List advantages of updating stock records</li> </ul>	RAS/ NO106 PC7, PC8, PC9, KA7, KA8, KA9	Role Play		1 Hour
Visual Merchandising Display	<ul> <li>List multiple approaches for displaying merchandise</li> <li>Identify potential places for displaying products</li> <li>List different elements of display</li> <li>Recognise innovative and effective methods to improve visual effects</li> </ul>	RAS/ NO106 PC2, PC3, PC4, PC6, KB2, KB4	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
Visual Merchandising Display: Skill Practice	<ul> <li>List multiple approaches for displaying merchandise</li> <li>Identify potential places for displaying products</li> <li>List different elements of display</li> <li>Recognise innovative and effective methods to improve visual effects</li> </ul>	RAS/ NO106 PC2, PC3, PC4, PC6, KB2, KB4	Field Visit	Pen & note pad	3 Hours
Visual Merchandising Display: Skill Practice	<ul> <li>List multiple approaches for displaying merchandise</li> <li>Identify potential places for displaying products</li> <li>List different elements of display</li> <li>Recognise innovative and effective methods to improve visual effects</li> </ul>	RAS/ NO106 PC2, PC3, PC4, PC6, KB2, KB4	Activity	Participant Handbook, pencil	0.5 Hour
Visual Merchandising Display: Skill Practice	<ul> <li>List multiple approaches for displaying merchandise</li> <li>Identify potential places for displaying products</li> <li>List different elements of display</li> <li>Recognise innovative and effective methods to improve visual effects</li> </ul>	RAS/ NO106 PC2, PC3, PC4, PC6, KB2, KB4	Field Visit	Pen & note pad	2 Hours

5	Dressing of Visual Merchan-	Companies' Visual Design and Merchandising	Recognise the importance of visual design and merchandising     List objectives of visual display	RAS/ NO107 PC3, PC8,	Facilitation with PPT, Videos, Trainer led	White board, Marker, Overhead projector,	3 Hours
	dising Displays	Policies	<ul> <li>Identify types of merchandising display approaches</li> <li>Recognise selling features of merchandise</li> </ul>	KA12, KA14, KB5	classroom discussion	Laptop, Internet access	
			<ul> <li>Outline legal requirements for pricing and ticketing products</li> </ul>				
		Companies' Visual Design and Merchandising Policies: Skill Practice	<ul> <li>Recognise the importance of visual design and merchandising</li> <li>List objectives of visual display</li> <li>Identify types of merchandising display approaches</li> <li>Recognise selling features of merchandise</li> <li>Outline legal requirements for pricing and ticketing products</li> </ul>	RAS/ NO107 PC3, PC8, KA12, KA14, KB5	Team Activity	Pencil and Paper	0.5 Hour
		Companies' Visual Design and Merchandising Policies: Skill Practice	<ul> <li>Recognise the importance of visual design and merchandising</li> <li>List objectives of visual display</li> <li>Identify types of merchandising display approaches</li> <li>Recognise selling features of merchandise</li> <li>Outline legal requirements for pricing and ticketing products</li> </ul>	RAS/ NO107 PC3, PC8, KA12, KA14, KB5	Activity	Pencil and Paper	0.5 Hour
		Creation of Focal Points within Display and their Use	<ul> <li>Define focal point of display</li> <li>Recognise need to clearly identify focal points of display</li> <li>Identify ways to set up merchandise display in store</li> <li>Choose suitable type of grouping strategy</li> </ul>	RAS/ NO107 PC1, PC2, KA1, KA2, KA5	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Creation of Focal Points within Display and their Use: Skill Practice	<ul> <li>Define focal point of display</li> <li>Recognise need to clearly identify focal points of display</li> <li>Identify ways to set up merchandise display in store</li> <li>Choose suitable type of grouping strategy</li> </ul>	RAS/ NO107 PC1, PC2, KA1, KA2, KA5	Field Visit	Pen & note pad	4 Hours
		Dressing Mannequins and Dressing Techniques for different Merchandise	<ul> <li>List important points to consider when dressing merchandise</li> <li>Identify dressing and display techniques</li> <li>Demonstrate various types of displays used in a retail store</li> <li>Recognise critical elements of display</li> </ul>	RAS/ NO107 PC2, PC7, PC8, KA3, KB4	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Dressing Mannequins and Dressing Techniques for different Merchandise:	<ul> <li>List important points to consider when dressing merchandise</li> <li>Identify dressing and display techniques</li> <li>Demonstrate various types of</li> </ul>	RAS/ NO107 PC2, PC7, PC8, KA3, KB4	Team Activity	Computer, Internet, Pencil and Paper	1 Hour
		Skill Practice	displays used in a retail store  Recognise critical elements of display				

	Creating an Atmosphere with Types, Directions, and Levels of Light	<ul> <li>Explain the importance of lighting in retail store displays</li> <li>Describe the smart ways of using lighting to highlight special merchandise</li> <li>Identify common graphics, symbols and signage used in retail stores</li> <li>Discuss ways to install creative displays</li> </ul>	RAS/ NO107 PC4, PC5, PC9, PC13, KA6, KA8, KA10, KA13, KB6	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
	Creating an Atmosphere with Types, Directions, and Levels of Light: Skill Practice	<ul> <li>Explain the importance of lighting in retail store displays</li> <li>Describe the smart ways of using lighting to highlight special merchandise</li> <li>Identify common graphics, symbols and signage used in retail stores</li> <li>Discuss ways to install creative displays</li> </ul>	RAS/ NO107 PC5, PC9, KA6, KA8, KA10, KA13, KB6	Field Visit	Pen & note pad	4 Hours
	Selecting Combinations of Shape, Colour, Texture, and Lighting for Visual Effects	<ul> <li>Identify different elements to create effects</li> <li>Discuss ways to use effects judiciously</li> <li>Evaluate visual effects of displays</li> <li>Identify need to take suggestions from colleagues regarding visual display appeal</li> </ul>	RAS/ NO107 PC10, PC11, PC14, KA4, KA10, KB1, KB2, KB3, KB6	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
	Selecting Combinations of Shape, Colour, Texture, and Lighting for Visual Effects: Skill Practice	<ul> <li>Identify different elements to create effects</li> <li>Discuss ways to use effects judiciously</li> <li>Evaluate visual effects of displays</li> <li>Identify need to take suggestions from colleagues regarding visual display appeal</li> </ul>	RAS/ NO107 PC10, PC11, PC14, KA4, KA10, KB1, KB2, KB3, KB6	Team Activity	Pencil, paper, pictures of retail stores	1 Hour
	Reporting Health and Safety Guidelines for Displays	<ul> <li>Identify mechanism for reporting of display concerns</li> <li>List steps to report display issues</li> <li>Explain health and safety guidelines pertaining to merchandise display</li> <li>Identify factors to be considered for retail floor displays</li> </ul>	RAS/ NO107 PC6, PC11, PC12, PC15, PC16, PC17, KA11, KA16,	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
	Reporting Health and Safety Guidelines for Displays: Skill Practice	<ul> <li>Identify mechanism for reporting of display concerns</li> <li>List steps to report display issues</li> <li>Explain health and safety guidelines pertaining to merchandise display</li> <li>Identify factors to be considered for retail floor displays</li> </ul>	RAS/ NO107 PC6, PC11, PC12, PC15, PC16, PC17, KA11, KA16,	Role Play		3 Hours

6	Dismantle and Store Visual Mer- chandising Displays	Dismantling and Protecting Retail Displays	<ul> <li>Explain the meaning of dismantling retail display</li> <li>Explain need to plan safe dismantling of displays</li> <li>Identify ways to protect retail display parts while dismantling</li> <li>Practice how to avoid damage to retail display parts</li> <li>List precautions while dismantling mannequin</li> </ul>	RAS/ NO108 PC1, PC2, KA1, KA2	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Dismantling and Protecting Retail Displays: Skill Practice	<ul> <li>Explain the meaning of dismantling retail display</li> <li>Explain need to plan safe dismantling of displays</li> <li>Identify ways to protect retail display parts while dismantling</li> <li>Practice how to avoid damage to retail display parts</li> <li>List precautions while dismantling mannequin</li> </ul>	RAS/ NO108 PC1, PC2, KA1, KA2	Team Activity	A mannequin	1 Hour
		Checking, Handling and Returning Retail Display Items	<ul> <li>Explain how to check the condition of retail display items before store opening</li> <li>List strategies for store opening</li> <li>Identify and remove unwanted materials</li> <li>Identify damaged items in a retail store</li> <li>Discuss ways to handle retail display for repair</li> </ul>	RAS/ NO108 PC3, PC4, KA3, KA4, KB2	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
		Checking, Handling and Returning Retail Display Items: Skill Practice	<ul> <li>Explain how to check the condition of retail display items before store opening</li> <li>List strategies for store opening</li> <li>Identify and remove unwanted materials</li> <li>Identify damaged items in a retail store</li> <li>Discuss ways to handle retail display for repair</li> </ul>	RAS/ NO108 PC3, PC4, KA3, KA4, KB2	Field Visit	Pen & note pad	3 Hours
		Checking, Handling and Returning Retail Display Items: Skill Practice	<ul> <li>Explain how to check the condition of retail display items before store opening</li> <li>List strategies for store opening</li> <li>Identify and remove unwanted materials</li> <li>Identify damaged items in a retail store</li> <li>Discuss ways to handle retail display for repair</li> </ul>	RAS/ NO108 PC3, PC4, KA3, KA4, KB2	Role Play		3 Hours
		Safe Cleaning of Materials, Equipment and Display Sites	<ul> <li>Describe the importance of using safe-cleaning materials and equipment</li> <li>Explain how to clean mannequins</li> <li>Explain ways to clean display units, props and display sites</li> <li>Discuss best practices for handling mannequins</li> </ul>	RAS/ NO108 PC5, PC11, KB1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours

		Safe Cleaning	Describe the importance of	RAS/	Activity	Display Units	1 Hour
		of Materials, Equipment and Display Sites: Skill Practice	using safe-cleaning materials and equipment  Explain how to clean mannequins	NO108 PC5, PC11, KB1	,	& Props	
			Explain ways to clean display units, props and display sites				
			<ul> <li>Discuss best practices for handling mannequins</li> </ul>				
		Storing Display Items Safely and Identifying Storage Space	<ul> <li>Explain the importance of storing display items safely</li> <li>Identify whether storage facilities are safe and secure</li> <li>Discuss ways to handle extra display items</li> <li>Identify suitable storage space of retail display items</li> </ul>	RAS/ NO108 PC6, PC8, PC9, KA6, KA9, KA10, KA11, KB4	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Storing Display Items Safely and Identifying Storage Space: Skill Practice	<ul> <li>Explain the importance of storing display items safely</li> <li>Identify whether storage facilities are safe and secure</li> <li>Discuss ways to handle extra display items</li> <li>Identify suitable storage space of retail display items</li> </ul>	RAS/ NO108 PC6, PC8, PC9, KA6, KA9, KA10, KA11, KB4	Field Visit	Pen & note pad	4 Hours
		Protective Packaging, Security Measure Requirements and Labelling Display Items	<ul> <li>Recognise the importance of protective packaging</li> <li>Explain security measure requirements</li> <li>Recognise the importance and need of labelling display items</li> <li>Identify ways to label display items</li> </ul>	RAS/ NO108 PC7, PC10, KA7, KA8	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Record Keeping, Associated Risks, Reporting of Display Items and their Storage Place	<ul> <li>Recognise the importance of keeping records of display items</li> <li>Discuss importance of storage facilities</li> <li>Analyse the risk associated with storage facilities</li> <li>Explain reporting dangers and risk at work</li> </ul>	RAS/ NO108 PC9, KA9, KA12	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Record Keeping, Associated Risks, Reporting of Display Items and their Storage Place: Skill Practice	<ul> <li>Recognise the importance of keeping records of display items</li> <li>Discuss importance of storage facilities</li> <li>Analyse the risk associated with storage facilities</li> <li>Explain reporting dangers and risk at work</li> </ul>	RAS/ NO108 PC9, KA9, KA12	Activity	Pen, notepad, computer, Internet	1 Hour
7	Preparing Products for Sale	Arrangement of Products for Sale	<ul> <li>Describe how to arrange products for sale</li> <li>Prepare layout for products</li> <li>Identify the different tools for arranging products for sale</li> <li>Discuss the importance of arranging products on top shelf</li> </ul>	RAS/ NO109 PC1, PC2, KA1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	4 Hours

Arrangement of Products	Describe how to arrange products for sale	RAS/ NO109	Activity		0.5 Hour
for Sale: Skill Practice	<ul> <li>Prepare layout for products</li> <li>Identify the different tools for arranging products for sale</li> <li>Discuss the importance of arranging products on top shelf</li> </ul>	PC1, PC2, KA1			
Arrangement of Products for Sale: Skill Practice	<ul> <li>Describe how to arrange products for sale</li> <li>Prepare layout for products</li> <li>Identify the different tools for arranging products for sale</li> <li>Discuss the importance of arranging products on top shelf</li> </ul>	RAS/ NO109 PC1, PC2, KA1	Field Visit	Pen & note pad	4 Hours
Assembling Products for Sale	<ul> <li>Explain how to assemble products for sale</li> <li>Apply manufacturer's instructions for grouping and assembling products</li> <li>Interpret how to report problems related to assembling products</li> <li>Define distribution centre</li> <li>Identify different material handling equipment</li> </ul>	RAS/ NO109 PC4, PC5, PC6, KA2, KA3, KA4	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	4 Hours
Assembling Products for Sale: Skill Practice	<ul> <li>Explain how to assemble products for sale</li> <li>Apply manufacturer's instructions for grouping and assembling products</li> <li>Interpret how to report problems related to assembling products</li> <li>Define distribution centre</li> <li>Identify different material handling equipment</li> </ul>	RAS/ NO109 PC4, PC5, PC6, KA2, KA3, KA4	Role Play		1.5 Hours
Handling Displayed Products	<ul> <li>Explain the need to check accurate assembly and safety of displayed products</li> <li>Identify quality standards for displayed products</li> <li>Recognise need to maintain product quality</li> <li>Discuss shelf layout decisions of retailers</li> </ul>	RAS/ NO109 PC3, PC5, PC7, KA6, KB1, KB2, KB3	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
Managing Damaged Products	<ul> <li>Explain handling of damaged products</li> <li>Explain management of retail returns</li> <li>Prepare a return authorisation</li> <li>Explain how to handle unused waste</li> </ul>	RAS/ NO109 PC8, KB2, KB4	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
Managing Damaged Products: Skill Practice	<ul> <li>Explain handling of damaged products</li> <li>Explain management of retail returns</li> <li>Prepare a return authorisation</li> <li>Explain how to handle unused waste</li> </ul>	RAS/ NO109 PC8, KB2, KB4	Field Visit	Pen & note pad	4 Hours

		Managing Damaged	Explain handling of damaged products	RAS/ NO109	Field Visit	Pen & note pad	4 Hours
		Products: Skill Practice	<ul> <li>Explain management of retail returns</li> <li>Prepare a return authorisation</li> <li>Explain how to handle unused waste</li> </ul>	PC8, KB2, KB4			
8	Loyalty Scheme Promotions	Understanding Loyalty Schemes	<ul> <li>Explain loyalty scheme</li> <li>List various characteristics and benefits of loyalty schemes</li> <li>Identify various information sources of loyalty schemes</li> <li>Express the importance of sources like company websites and advertisements in promoting loyalty schemes</li> </ul>	RAS/ NO118 PC2, PC4, KA1, KA3, KB1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Loyalty Scheme Offers Specific to Members	<ul> <li>Justify the need to offer special schemes to valued customers</li> <li>Identify ways to appreciate loyal customers</li> <li>Recognise ways to develop customers' interest in loyalty programmes</li> <li>Identify financial benefits of loyalty schemes to members</li> </ul>	RAS/ NO118 PC1, PC2, PC6, PC7, KA4	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
		Loyalty Scheme Offers Specific to Members: Skill Practice	<ul> <li>Justify the need to offer special schemes to valued customers</li> <li>Identify ways to appreciate loyal customers</li> <li>Recognise ways to develop customers' interest in loyalty programmes</li> <li>Identify financial benefits of loyalty schemes to members</li> </ul>	RAS/ NO118 PC1, PC2, PC6, PC7, KA4	Role Play		1 Hour
		Responding to Customer Queries and Concerns about the Loyalty Scheme	<ul> <li>Recognise the importance of probing customers for information</li> <li>Review the role of a cashier in gathering customer information</li> <li>Identify how to handle customer queries in a friendly manner</li> <li>Identify buying signals in customers</li> </ul>	RAS/ NO118 PC2, PC3, PC4, PC5, KA5, KA6	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Responding to Customer Queries and Concerns about the Loyalty Scheme: Skill Practice	<ul> <li>Recognise the importance of probing customers for information</li> <li>Review the role of a cashier in gathering customer information</li> <li>Identify how to handle customer queries in a friendly manner</li> <li>Identify buying signals in customers</li> </ul>	RAS/ NO118 PC2, PC3, PC4, PC5, KA5, KA6	Field Visit	Pen & note pad	4 Hours

	Preparing Customers to Register for a Loyalty Scheme	<ul> <li>Recognise need to promptly register potential customers for loyalty schemes</li> <li>List reward structures for customers</li> <li>Illustrate the format of a loyalty scheme application form</li> <li>Identify ways to convince customers in filling application form</li> </ul>	RAS/ NO118 PC4, PC8, PC11, KA9, KA10	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
	Preparing Customers to Register for a Loyalty Scheme: Skill Practice	<ul> <li>Recognise need to promptly register potential customers for loyalty schemes</li> <li>List reward structures for customers</li> <li>Illustrate the format of a loyalty scheme application form</li> <li>Identify ways to convince customers in filling application form</li> </ul>	RAS/ NO118 PC4, PC8, PC11, KA9, KA10	Role Play		1 Hour
	Preparing Customers to Register for a Loyalty Scheme: Skill Practice	<ul> <li>Recognise need to promptly register potential customers for loyalty schemes</li> <li>List reward structures for customers</li> <li>Illustrate the format of a loyalty scheme application form</li> <li>Identify ways to convince customers in filling application form</li> </ul>	RAS/ NO118 PC4, PC8, PC11, KA9, KA10	Role Play		1 Hour
	Proof of Membership	<ul> <li>Interpret how the loyalty kit acts as a proof of membership for customers</li> <li>Explain how to crosscheck details with customers</li> <li>List reasons to offer loyalty cards</li> </ul>	RAS/ NO118 PC9, PC10, KA10, KA11, KA12	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
	Proof of Membership: Skill Practice	<ul> <li>Interpret how the loyalty kit acts as a proof of membership for customers</li> <li>Explain how to crosscheck details with customers</li> <li>List reasons to offer loyalty cards</li> </ul>	RAS/ NO118 PC9, PC10, KA10, KA11, KA12	Practical	A sample acknowled- gement email or SMS	0.5 Hour
	Proof of Membership: Skill Practice	<ul> <li>Interpret how the loyalty kit acts as a proof of membership for customers</li> <li>Explain how to crosscheck details with customers</li> <li>List reasons to offer loyalty cards</li> </ul>	RAS/ NO118 PC9, PC10, KA10, KA11, KA12	Field Visit	Pen & note pad	3 Hours
1	Proof of Membership: Skill Practice	<ul> <li>Interpret how the loyalty kit acts as a proof of membership for customers</li> <li>Explain how to crosscheck details with customers</li> <li>List reasons to offer loyalty cards</li> </ul>	RAS/ NO118 PC9, PC10, KA10, KA11, KA12	Team Activity	Pencil and sample membership form	0.5 Hour

9	Store Secu- rity	Importance of Workplace	Explain the concept of workplace security	RAS/ NO119	Facilitation with PPT,	White board, Marker,	1 Hour	
		Importance of Workplace Security: Skill Practice	Discuss the importance of workplace security     List some common security measures taken by retailers	PC4, KA1, KA2, KA3, KB1	Videos, Trainer led classroom discussion	Overhead projector, Laptop, Internet		
			Identify some good practices to maintain security			access		
			Explain the concept of workplace security	RAS/ NO119	Field Visit	Pen & note pad	3 Hours	
			•	Discuss the importance of workplace security	PC4, KA1, KA2, KA3, KB1			
			<ul> <li>List some common security measures taken by retailers</li> <li>Identify some good practices to maintain security</li> </ul>	KDI				
		Various Types of Security Risks	Explain different types of security risks	RAS/ NO119	Facilitation with PPT,	White board, Marker,	1.5 Hours	
			<ul> <li>Distinguish between security risks, like shoplifting, burglary and by employees theft</li> </ul>	PC1, KA3, KA4, KA5, KA6	Videos, Trainer led classroom discussion	Overhead projector, Laptop, Internet access		
			Recognise aggressive customers as a potential security risk					
			List ways to deal with aggressive customers					
		Various Types of Security	<ul> <li>Explain different types of security risks</li> </ul>	RAS/ NO119	Team Activity	Computer, Internet,	0.5 Hour	
		Risks: Skill Practice	<ul> <li>Distinguish between security risks, like shoplifting, burglary and by employees theft</li> </ul>	PC1, KA3, KA4, KA5, KA6		Pencil and Paper		
			<ul> <li>Recognise aggressive customers as a potential security risk</li> <li>List ways to deal with aggressive</li> </ul>					
			customers					
		Various Types of Security Risks: Skill	Explain different types of security risks	RAS/ NO119	Role Play		2 Hours	
		Practice	<ul> <li>Distinguish between security risks, like shoplifting, burglary and by employees theft</li> </ul>	PC1, KA3, KA4, KA5, KA6				
			<ul> <li>Recognise aggressive customers as a potential security risk</li> <li>List ways to deal with aggressive</li> </ul>					
			customers					
		Identifying and Preventing Security Risks	<ul> <li>Identify and prevent security risks</li> <li>List some security measures like implementing good store design and enforcing employee training</li> <li>Discuss ways to reduce employee theft</li> <li>Outline security policies and control mechanisms</li> </ul>	RAS/ NO119 PC1, PC2, PC4, K3, KA4, KA5	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1.5 Hours	
		Identifying and Preventing Security Risks: Skill Practice	<ul> <li>Identify and prevent security risks</li> <li>List some security measures like implementing good store design and enforcing employee training</li> <li>Discuss ways to reduce employee theft</li> <li>Outline security policies and control mechanisms</li> </ul>	RAS/ NO119 PC1, PC2, PC4, K3, KA4, KA5	Field Visit	Pen & note pad	2 Hours	

Noticing and Reporting Security Risks	<ul> <li>Identify and report security risks</li> <li>Recognise that compliance ensures security and reduces risk</li> <li>Recognise need to adopt multilayered approach to security</li> <li>Explain ways to remain alert on the job</li> </ul>	RAS/ NO119 PC2, PC3, PC5, KA3, KA8	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1.5 Hours
Noticing and Reporting Security Risks: Skill Practice	<ul> <li>Identify and report security risks</li> <li>Recognise that compliance ensures security and reduces risk</li> <li>Recognise need to adopt multilayered approach to security</li> <li>Explain ways to remain alert on the job</li> </ul>	RAS/ NO119 PC2, PC3, PC5, KA3, KA8	Activity	Computer, Internet, Pencil and Paper	0.5 Hour
Barriers in Identifying Security Risks	<ul> <li>Locate the barriers in identifying security risks</li> <li>List barriers like less attentive store staff and heavy footfall</li> <li>Describe cyber risk in retail</li> <li>Identify solutions for overcoming barriers</li> </ul>	RAS/ NO119 PC4, KA2, KA6	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1.5 Hours
Barriers in Identifying Security Risks: Skill Practice	<ul> <li>Locate the barriers in identifying security risks</li> <li>List barriers like less attentive store staff and heavy footfall</li> <li>Describe cyber risk in retail</li> <li>Identify solutions for overcoming barriers</li> </ul>	RAS/ NO119 PC4, KA2, KA6	Team Activity	Pencil and Paper	0.5 Hour
Reporting of Security Risks	<ul> <li>Explain reporting of security risks in store</li> <li>Recognise need of a separate security department</li> <li>Identify persons responsible for handling security risks</li> <li>List duties of security personnel</li> </ul>	RAS/ NO119 PC2, PC3, PC5, KA3, KA7, KA8	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1.5 Hours
Reasons Why Only Authorised Personnel should Take Responsibility of Security Risks	<ul> <li>Identify people responsible for handling security risks</li> <li>Explain why only authorised personnel should take responsibility of security</li> <li>Value the security of others in retail store</li> <li>Identify ways to stay safe at work</li> </ul>	RAS/ NO119 PC3, KA2, KA9,	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1.5 Hours
Key Security Solutions	<ul> <li>Explain use of tags as security solutions</li> <li>Describe importance of having a store opening team</li> <li>Identify measures taken before closing the store</li> </ul>	RAS/ NO119 PC4, KB1, KB2, KB3	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1 Hour
Key Security Solutions	<ul> <li>Explain use of tags as security solutions</li> <li>Describe importance of having a store opening team</li> <li>Identify measures taken before closing the store</li> </ul>	RAS/ NO119 PC4, KB1, KB2, KB3	Field Visit	Pen & note pad	2.5 Hours

10	Health and Safety at Workplace	Health, Safety and Security Plans and Procedures	<ul> <li>Recognise legal obligation of employers to keep workers safe</li> <li>Explain how to lift and handle goods safely</li> <li>Discuss planning for safe and efficient lifting of goods</li> <li>Ensure suitable safety measures before lifting goods</li> <li>Identify the threats to the workers and workplace</li> <li>Recognise the disadvantages of not following health and safety measures in a retail store</li> </ul>	RAS/ NO121 PC3, PC9, PC10, PC12, PC14, KA5, KA10, KA12, KB1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Health, Safety and Security Plans and Procedures: Skill Practice	<ul> <li>Recognise legal obligation of employers to keep workers safe</li> <li>Explain how to lift and handle goods safely</li> <li>Discuss planning for safe and efficient lifting of goods</li> <li>Ensure suitable safety measures before lifting goods</li> <li>Identify the threats to the workers and workplace</li> <li>Recognise the disadvantages of not following health and safety measures in a retail store</li> </ul>	RAS/ NO121 PC3, PC9, PC10, PC12, PC14, KA5, KA10, KA12, KB1	Activity	Heavy box	0.5 Hour
		Reporting Health and Safety Concerns	<ul> <li>Explain importance of reporting health and safety measures</li> <li>Identify different sources of workplace hazards</li> <li>Discuss how to handle hazardous substances safely on your own</li> <li>Recognise need to promptly report health and safety concerns</li> </ul>	RAS/ NO121 PC2, PC3, PC8, PC14, KA2, KA3	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1.5 Hours
		Reporting Health and Safety Concerns: Skill Practice	<ul> <li>Explain importance of reporting health and safety measures</li> <li>Identify different sources of workplace hazards</li> <li>Discuss how to handle hazardous substances safely on your own</li> <li>Recognise need to promptly report health and safety concerns</li> </ul>	RAS/ NO121 PC2, PC3, PC8, PC14, KA2, KA3	Role Play		2.5 Hours
		Company Policies towards Health and Safety	<ul> <li>Indicate possible health and safety threats at workplace</li> <li>Explain the parameters to check safety, security and health breaches</li> <li>Recognise the importance of following company's safety policies</li> <li>Identify safety gears for retail workers</li> </ul>	RAS/ NO121 PC3, PC4, PC6, KA5, KA6	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1.5 Hours

		Compari	a Indicate possible beeth and	DAC/	Field Vieit	Dan 9	2 110
		Company Policies towards Health and	Indicate possible health and safety threats at workplace	RAS/ NO121	Field Visit	Pen & note pad	3 Hours
		Safety: Skill Practice	Explain the parameters to check safety, security and health breaches	PC3, PC4, PC6, KA5, KA6			
			<ul> <li>Recognise the importance of following company's safety policies</li> </ul>				
			Identify safety gears for retail workers				
		First Aid and Emergency Medical Plan	<ul> <li>Define first aid</li> <li>Describe the main objective of first aid</li> <li>List emergency medicines</li> <li>Identify the need for first aid</li> </ul>	RAS/ NO121 PC2, PC3, PC5, KA3	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1 Hour
		First Aid and Emergency Medical Plan: Skill Practice	<ul> <li>Define first aid</li> <li>Describe the main objective of first aid</li> <li>List emergency medicines</li> <li>Identify the need for first aid</li> </ul>	RAS/ NO121 PC2, PC3, PC5, KA3	Role Play		2 Hours
		Following Up the Emergency and Evacuation Plan	<ul> <li>Distinguish between emergency and evacuation plans</li> <li>Identify various symbols generally used in emergency and evacuation plans</li> <li>List information included in an emergency plan</li> <li>Explain to others how to help people evacuate the workplace</li> </ul>	RAS/ NO121 PC1, PC4, PC5, PC6, KA1, KA2	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1 Hour
		Creating Better Work Environment	<ul> <li>Recognise importance of safe working environment</li> <li>Explain employees' participation in maintaining safe-working environment</li> <li>Define the objective and purpose of a mock-evacuation drill</li> <li>Describe how to adopt ecofriendly working techniques</li> </ul>	RAS/ NO121 PC6, PC7, PC8, PC11, PC13, KA4, KA6, KA7, KA11, KB2	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1 Hour
11	Store Clean- liness and Hygiene	Organisational Standards for Clean Work Areas	<ul> <li>Outline organisational standards for cleanliness</li> <li>Recognise the need for clean work areas</li> <li>Explain housekeeping</li> <li>Identify the need to maintain a housekeeping programme</li> </ul>	RAS/ NO123 PC13, PC14, PC15, KA3, KA7, KA8, KA12	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1 Hour
		Significance of Maintaining a Waste and Litter- Free Workplace	<ul> <li>Identify the need for maintaining waste-free workplace</li> <li>Describe impact of litter-free workplace on customers</li> <li>Explain the need for waste reduction</li> <li>Outline the techniques to reduce waste</li> </ul>	RAS/ NO123 PC4, PC10, PC11, KA5, K9	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1 Hour

Ma a V Litt Wo	aintaining Waste and tter- Free forkplace: Skill ractice	<ul> <li>Identify the need for maintaining waste-free workplace</li> <li>Describe impact of litter-free workplace on customers</li> <li>Explain the need for waste reduction</li> </ul>	RAS/ NO123 PC4, PC10, PC11, KA5, KA9	Field Visit	Pen & note pad	2 Hours
Dis Wa	ethods of scarding	Outline the techniques to reduce waste     Recognise need for discarding waste     List the four R's of waste	RAS/ NO123 PC6, KA7,	Facilitation with PPT, Videos, Trainer led	White board, Marker, Overhead projector,	1 Hour
Liu	•	removal Identify methods for discarding waste List ways to ensure a clean and tidy workplace	KA8	classroom discussion	Laptop, Internet access	
Sat Ass	fety Risks	<ul> <li>Identify health risks associated with spillage</li> <li>List some health hazards of spillage</li> <li>Explain risk management</li> <li>List some measures for risk management</li> </ul>	RAS/ NO123 PC3, KA1, KA2, KA3, KA4, KB1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1 Hour
Th Cle	norough ean-up of billage	<ul> <li>Describe the need for cleaning spillage</li> <li>Identify need for regular checking for spillage</li> <li>Describe guidelines to keep work surfaces clean in a retail environment</li> <li>List ways to execute planned and safe clean-up of spillage</li> </ul>	RAS/ NO123 PC3, KA1, KA2, KA3, KA4, KB1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	0.5 Hour
of	Reducing	<ul> <li>List the steps to reduce spillage risks</li> <li>Discuss how cleaning spills can avoid injury to workers</li> </ul>	RAS/ NO123 PC3, KA1, KA2, KA3, KA4, KA9, KA11, KB1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	0.5 Hour
of Spi	Reducing oillage Risks:	List the steps to reduce spillage risks Discuss how cleaning spills can avoid injury to workers	RAS/ NO123 PC3, KA1, KA2, KA3, KA4, KA9, KA11, KB1	Field Visit	Pen & note pad	2 Hours
Eq	quipment and aterials	<ul> <li>List common cleaning         equipment used in retail stores</li> <li>Identify equipment used to         clean spillage</li> <li>Distinguish between mechanical         and chemical methods to clean         spillage</li> <li>List best practices for         maintenance of cleaning         equipment</li> </ul>	RAS/ NO123 PC1, PC2, PC7, PC8, PC9, PC12, KA10, KA11, KB2	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1 Hour

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		Cleaning Equipment and Materials: Skill Practice	<ul> <li>List common cleaning equipment used in retail stores</li> <li>Identify equipment used to clean spillage</li> <li>Distinguish between mechanical and chemical methods to clean spillage</li> <li>List best practices for maintenance of cleaning equipment</li> </ul>	RAS/ NO123 PC1, PC2, PC7, PC8, PC9, PC12, KA10, KA11, KB2	Field Visit	Pen & note pad	2 Hours
		Cleaning a Store without Unsettling Customers	<ul> <li>List best practices for cleaning retail store</li> <li>Explain health and safety regulations for cleaning store</li> <li>List ways to clean floors properly</li> </ul>	RAS/ NO123 PC1, PC6, PC11, PC13, KA6, KA7	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1 Hour
		Effective Cleaning Practices and Techniques	<ul> <li>Describe various effective cleaning practices</li> <li>List appropriate cleaning practices</li> <li>Identify some effective cleaning techniques</li> <li>List tools to make cleaning easy</li> </ul>	RAS/ NO123 PC8, PC9, PC10, PC11, PC14, KA3, KA7, KA12	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	1 Hour
		Effective Cleaning Practices and Techniques: Skill Practice	<ul> <li>Describe various effective cleaning practices</li> <li>List appropriate cleaning practices</li> <li>Identify some effective cleaning techniques</li> <li>List tools to make cleaning easy</li> </ul>	RAS/ NO123 PC8, PC9, PC10, PC11, PC14, KA3, KA7, KA12	Field Visit	Pen & note pad	2 Hours
12	Providing Information and Advice to Customers	Information on Products and Services	<ul> <li>Demonstrate ways to pass on information to customers</li> <li>Discuss role of salesperson in giving product information</li> <li>Recognise need to provide clear and accurate information</li> <li>Identify salesperson's role in satisfying customer queries</li> </ul>	RAS/ NO124 PC1, PC2, PC3, PC4, PC5, PC6, PC7, KA1, KA2, KB1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
		Information on Products and Services: Skill Practice	<ul> <li>Demonstrate ways to pass on information to customers</li> <li>Discuss role of salesperson in giving product information</li> <li>Recognise need to provide clear and accurate information</li> <li>Identify salesperson's role in satisfying customer queries</li> </ul>	RAS/ NO124 PC1, PC2, PC3, PC4, PC5, PC6, PC7, KA1, KA2, KB1	Field Visit	Pen & note pad	4 Hours
		Acknowledging Customer Loyalty and Confidence	<ul> <li>Identify why customer loyalty is essential for retailers</li> <li>Discuss ways to attract customer satisfaction and loyalty</li> <li>Identify reasons for customer dissatisfaction</li> <li>Recognise policies to handle customer complaints</li> </ul>	RAS/ NO124 PC5, PC6, KA5, KA12	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours

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		Acknowledging Customer Loyalty and Confidence: Skill Practice	<ul> <li>Identify why customer loyalty is essential for retailers</li> <li>Discuss ways to attract customer satisfaction and loyalty</li> <li>Identify reasons for customer dissatisfaction</li> <li>Recognise policies to handle customer complaints</li> </ul>	RAS/ NO124 PC5, PC6, KA5, KA12	Field Visit	Pen & note pad	4 Hours
		Handling Angry Customers	<ul> <li>List steps to handle angry customers</li> <li>Identify measures to resolve customer complaints</li> <li>Interpret how to escalate customer complaints</li> <li>Analyse how to identify the nature of the complaint</li> </ul>	RAS/ NO124 PC8, PC9, KA7	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
		Handling Angry Customers: Skill Practice	<ul> <li>List steps to handle angry customers</li> <li>Identify measures to resolve customer complaints</li> <li>Interpret how to escalate customer complaints</li> <li>Analyse how to identify the nature of the complaint</li> </ul>	RAS/ NO124 PC8, PC9, KA7	Field Visit	Pen & note pad	4 Hours
		Handling Angry Customers: Skill Practice	<ul> <li>List steps to handle angry customers</li> <li>Identify measures to resolve customer complaints</li> <li>Interpret how to escalate customer complaints</li> <li>Analyse how to identify the nature of the complaint</li> </ul>	RAS/ NO124 PC8, PC9, KA7	Role Play		2 Hours
		Maintaining Customer Loyalty while Dealing with Complaints	<ul> <li>List ways to maintain customer loyalty</li> <li>Identify need to provide solutions instead of arguing with customer</li> <li>Recognise importance of dealing with customers</li> <li>List customer-oriented tips</li> </ul>	RAS/ NO124 PC12, PC13, PC14, PC15, PC16, PC17, KA8, KA9, KA10, KA11,	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2.5 Hours
		Customer and Trader Rights	<ul> <li>Distinguish between consumer and trader</li> <li>Identify the rights of customers</li> <li>Recognise your duty to uphold customer rights</li> </ul>	RAS/ NO124 KA13, KA14	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2.5 Hours
13	Positive Presenta- tion of Yourself	Defining an Organisation	<ul> <li>Explain the basics of an organisation</li> <li>Describe organisational behaviour policies for customers</li> <li>List organisational behaviour policies for colleagues</li> </ul>	RAS/ NO130 PC1, PC2, PC3, PC7, PC9, KA1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours

Defining an Organisation:	Explain the basics of an organisation	RAS/ NO130	Activity	Pen and paper	1 Hour
Skill Practice	Describe organisational behaviour policies for customers     List organisational behaviour	PC1, PC2, PC3, PC7, PC9, KA1		pape.	
Understanding Basic Etiquette	<ul> <li>Select basic etiquette while interacting with internal and external customers</li> <li>Discuss the grooming standards for employees</li> <li>Apply general guidelines while communicating with customer</li> <li>Answer customers questions in simplified manners</li> </ul>	RAS/ NO130 PC5, PC8, PC9, PC11, KA3	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
Dealing with Customer	<ul> <li>Discuss the importance of customer care</li> <li>Apply guidelines to greet customers</li> <li>Identify customer's perception and requirements</li> <li>List ways to deliver quality services to customers</li> </ul>	RAS/ NO130 PC1, PC2, PC3, PC4, PC5, PC6, PC7, KA1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
Dealing with Customer: Skill Practice	<ul> <li>Discuss the importance of customer care</li> <li>Apply guidelines to greet customers</li> <li>Identify customer's perception and requirements</li> <li>List ways to deliver quality services to customers</li> </ul>	RAS/ NO130 PC1, PC2, PC3, PC4, PC5, PC6, PC7, KA1	Role Play		2.5 Hours
Responding to Customer	<ul> <li>List various ways of responding to customer</li> <li>Explain complex information to the customer</li> <li>Change yourself to match the customer's behaviour</li> <li>Tell customers about the new product or service</li> <li>Show courtesy towards the customer</li> <li>Provide the best solution to customers' query</li> </ul>	RAS/ NO130 PC8, PC9, PC10, PC11, PC12, KA2, KA3	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
Responding to Customer: Skill Practice	<ul> <li>List various ways of responding to customer</li> <li>Explain complex information to the customer</li> <li>Change yourself to match the customer's behaviour</li> <li>Tell customers about the new product or service</li> <li>Show courtesy towards the customer</li> <li>Provide the best solution to customers' query</li> </ul>	RAS/ NO130 PC8, PC9, PC10, PC11, PC12, KA2, KA3	Role Play		2.5 Hours

		Assisting the Customer	<ul> <li>Identify the AIM (Assess, Identify, Maintain) model for helping customers</li> <li>List questions to assess problems with the customer</li> <li>Describe tips for maintaining customer relationship</li> <li>Discuss steps to maintain information database</li> </ul>	RAS/ NO130 PC13, PC14, PC15, PC16, KA4, KA5	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2 Hours
		Assisting the Customer: Skill Practice	<ul> <li>Identify the AIM (Assess, Identify, Maintain) model for helping customers</li> <li>List questions to assess problems with the customer</li> <li>Describe tips for maintaining customer relationship</li> <li>Discuss steps to maintain information database</li> </ul>	RAS/ NO130 PC13, PC14, PC15, PC16, KA4, KA5	Field Visit	Pen & note pad	5 Hours
14	Work Effectively in a Retail	Effective Teamwork	<ul> <li>Discuss how to build healthy relationships with colleagues</li> <li>Recognise the need to show respect to colleagues and managers</li> <li>Explain the importance of planning and organising daily work routine</li> <li>List ways to work effectively with co-workers</li> </ul>	RAS/ NO137 PC2, PC4, PC5, PC7, PC13, PC14, PC15, KA1	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	3 Hours
		Effective Teamwork: Skill Practice	<ul> <li>Discuss how to build healthy relationships with colleagues</li> <li>Recognise the need to show respect to colleagues and managers</li> <li>Explain the importance of planning and organising daily work routine</li> <li>List ways to work effectively with co-workers</li> </ul>	RAS/ NO137 PC2, PC4, PC5, PC7, PC13, PC14, PC15, KA1	Role Play		1.5 Hours
		Sharing Information and Making Commitments with Colleagues	<ul> <li>Describe the importance of sharing information with coworkers</li> <li>Interpret how to perform task as a team</li> <li>Discuss the importance of dress code and personal hygiene in a retail store</li> <li>Describe the need to clarify workplace information by asking questions</li> <li>Assess how to help colleagues with problems</li> <li>Discuss the need to adopt non-discriminatory attitude at workplace</li> </ul>	RAS/ NO137 PC1, PC6, PC7, PC8, PC9, PC12, KB1, KB2	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2.5 Hours

Sharing Information and Making Commitments with Colleagues: Skill Practice	<ul> <li>Describe the importance of sharing information with coworkers</li> <li>Interpret how to perform task as a team</li> <li>Discuss the importance of dress code and personal hygiene in a retail store</li> <li>Describe the need to clarify workplace information by asking questions</li> <li>Assess how to help colleagues with problems</li> <li>Discuss the need to adopt non-discriminatory attitude at workplace</li> </ul>	RAS/ NO137 PC1, PC6, PC7, PC8, PC9, PC12, KB1, KB2	Field Visit	Pen & note pad	4.5 Hours
Sharing Information and Making Commitments with Colleagues: Skill Practice	<ul> <li>Describe the importance of sharing information with coworkers</li> <li>Interpret how to perform task as a team</li> <li>Discuss the importance of dress code and personal hygiene in a retail store</li> <li>Describe the need to clarify workplace information by asking questions</li> <li>Assess how to help colleagues with problems</li> <li>Discuss the need to adopt non-discriminatory attitude at workplace</li> </ul>	RAS/ NO137 PC1, PC6, PC7, PC8, PC9, PC12, KB1, KB2	Team Activity	Pencil and paper	0.5 Hour
Resolving Conflicts with Colleagues	<ul> <li>Discover how to discuss and resolve conflicts in a team</li> <li>List the types of misbehaviour in a workplace</li> <li>Recognise need to report misbehaviour at the workplace</li> <li>List ways to resolve conflicts with colleagues</li> </ul>	RAS/ NO137 PC10, PC11, KA1, KA3, KB6	Facilitation with PPT, Videos, Trainer led classroom discussion	White board, Marker, Overhead projector, Laptop, Internet access	2.5 Hours
Resolving Conflicts with Colleagues: Skill Practice	<ul> <li>Discover how to discuss and resolve conflicts in a team</li> <li>List the types of misbehaviour in a workplace</li> <li>Recognise need to report misbehaviour at the workplace</li> <li>List ways to resolve conflicts with colleagues</li> </ul>	RAS/ NO137 PC10, PC11, KA1, KA3, KB6	Role Play		1.5 Hours

## Annexure II

## **Assessment Criteria**

## **CRITERIA FOR ASSESSMENT OF TRAINEES**

Assessment Criteria for Assistant Beauty Therapist	
Job Role	Retail Trainee Associate
Qualification Pack	RAS/Q0103
Sector Skill Council	Retail

Sr. No.	Guidelines for Assessment
1.	Criteria for assessment for each Qualification Pack will be created by the Sector Skill Council. Each Performance Criteria (PC) will be assigned marks proportional to its importance in NOS. SSC will also lay down proportion of marks for Theory and Skills Practical for each PC.
2.	The assessment for the theory part will be based on knowledge bank of questions created by the SSC
3.	Assessment will be conducted for all compulsory NOS, and where applicable, on the selected elective/option NOS/set of NOS.
4.	Individual assessment agencies will create unique question papers for theory part for each candidate at each examination/training center (as per assessment criteria below).
5.	Individual assessment agencies will create unique evaluations for skill practical for every student at each examination/training center based on this criterion.
6.	To pass the Qualification Pack, every trainee should score a minimum of 70% of aggregate marks to successfully clear the assessment.
7.	In case of unsuccessful completion, the trainee may seek reassessment on the Qualification Pack.

	Compulsory NOS  Total Marks: 100					
Assessment outcomes	Assessment Criteria for outcomes	Total marks	Out of	Theory	Skills Practical	
RAS/N0105 To display	PC1. Identify the need for the display in relation to stock, space, position of the display and dates.		10	5	5	
stock to promote sales	PC2. Check that the display area is the right size and report any concerns promptly.		5	2.5	2.5	
	PC3. Gather the materials, equipment and stock needed for the display and check that they are clean, safe and in good working order.	100	10	5	5	
	PC4. Follow company procedures for clearing, cleaning and preparing the display area before use.		5	2.5	2.5	
	PC5. Set up and dismantle the display safely, in line with plans and within the time allowed.		10	5	5	
	PC6. Check that the display is clean, tidy and safe for use.		5	2.5	2.5	
	PC7. Check that the display has the levels of stock needed.		10	5	5	

	PC8. Clean and store equipment and excess materials; get rid of waste safely, correctly and promptly.		5	2.5	2.5
	PC9. Check requirements for labelling stock.		10	5	5
	PC10. Check information on the label is clear, accurate and legal before starting to label stock.		5	2.5	2.5
	PC11. Report promptly any information on labels that may need changing.		5	2.5	2.5
	PC12. Attach the right labels to the right products.		5	2.5	2.5
	PC13. Position labels so that they are securely fastened and customers can see them clearly.		10	5	5
	PC14. Complete labelling within the time allowed.		5	2.5	2.5
	Total		100	50	50
RAS/N0106	PC1. Identify the purpose, content and style of the display.		10	5	5
To plan and prepare visual merchandising displays	PC2. Identify the equipment, materials, merchandise and props needed to create and install the display and the dates for completing it.	100	10	5	5
Plan and prepare visual	PC3. Evaluate whether the place to put the display is likely to fulfil the design brief.		10	5	5
merchandising displays	PC4. Create new and effective ways of improving the visual effect, within his/her limits of design brief, company's visual design policies and authority you have.		15	7.5	7.5
	PC5. Confirm that the features of merchandise and props shown in the design brief are those most likely to attract customers' attention.		10	5	5
	PC6. Identify other merchandise and props when those originally specified are not available or not suitable, and agree the selections with the right person.		10	5	5
	PC7. Verify arrangements for delivery of merchandise & props with right people, allowing enough time for deliveries to arrive before display must be installed.		15	7.5	7.5
	PC8. Check the progress of deliveries and take suitable action if delays seem likely.		10	5	5
	PC9. Update stock records to account for merchandise on display.		10	5	5
	Total		100	50	50
RAS/N0107 To dress visual	PC1. Use the design brief to identify the focal points of the display.		10	5	5
merchandising displays	PC2. Choose shapes, colours and groupings that are suited to the purpose and style of the display.		5	2.5	2.5
	PC3. Create displays that achieve the required visual effect and are consistent with the company's visual design policy.	100 5		2.5	2.5
	PC4. Position merchandise, graphics and signs in ways that promote sales.		5	2.5	2.5

	PC5. Check that lighting is installed in line with the design brief.		5	2.5	2.5
	PC6. Check that the finished display meets health and safety guidelines and legal requirements.		10	5	5
	PC7. Position merchandise, graphics & signs according to guidelines & in ways that attract attention & interest of customers & give customers information they need.		5	2.5	2.5
	PC8. Group merchandise appropriately for the purpose & style of display, the selling features of merchandise & the visual effect needed under the design brief.		5	2.5	2.5
	PC9. Make sure that lighting is installed in line with lighting requirements.		5	2.5	2.5
	PC10. Check that all the parts of the display are suitable for the purpose of the display and meet the requirements.		5	2.5	2.5
	PC11. Check that the display meets requirements for easy access, safety and security.		5	2.5	2.5
	PC12. Identify safety and security risks to the display and choose suitable ways of reducing risks.		5	2.5	2.5
	PC13. Consider how the display looks from all the directions from which customers will approach it.		5	2.5	2.5
	PC14. Encourage colleagues to provide constructive comments about the display.		5	2.5	2.5
	PC15. Promptly make any adjustments that he/she is authorised to make and that are needed to achieve the visual effect and to make the display safe and secure.		5	2.5	2.5
	PC16. Regularly check the display's visual effect.		5	2.5	2.5
	PC17. Promptly report to the right person any problems and risks that he/she is not responsible for sorting out himself/herself.		10	5	5
	Total		100	50	50
RAS/N0108 To	PC1. Dismantle displays safely.		5	2.5	2.5
dismantle and store visual merchandising	PC2. Protect the parts of the display from being damaged during dismantling.		10	5	5
displays	PC3. Return the parts of the display to the appropriate places promptly and, if needed, in a saleable condition.	100	10	5	5
	PC4. Get rid of unwanted materials safely and keep accurate records of this if needed.	100	10	5	5
	PC5. Clean display sites and parts using safe and approved cleaning materials and equipment.		10	5	5
	PC6. Work out accurately the storage space required.		10	5	5

in the package.  PC2. Remove all unwanted packaging and safely get rid of waste.  PC3. Gather the tools he/she needs for putting products together.  PC4. Use safe work methods and follow manufacturers' instructions when putting products together.  PC5. Check that products have been assembled correctly and can be used safely.  PC6. Ask the right person for help when products are proving difficult to put together.  PC7. Check regularly that products on display are in a satisfactory condition.  PC8. Promptly remove damaged products from display and follow company procedures for dealing with them.  Total  AS/N0118 op promote opportunities to ask customers if they are members of the loyalty scheme and whether they are interested in joining.  PC1. Take suitable opportunities to ask customers if they are members of the loyalty scheme and whether they are interested in joining.  PC2. Explain clearly and accurately to customers how joining the scheme would benefit them, including any current special offers relating to the scheme.  PC3. Respond positively to any questions or objections that the customer raises.  PC4. Provide relevant information to the customer to help them decide whether to join the scheme.  PC5. Treat the customer politely at all times and in a way that promotes goodwill.  PC6. Recognise accurately when customers are interested in						
PC9. Keep accurate and up-to-date records of items in storage.				10	5	5
PC10. Identify damaged items, missing items and dangers and risks to health and safety, and report these promptly to the right person.  PC11. Check that storage facilities and items in storage are clean, safe, secure and accessible only to those with a right to them.  Total  AS/N0109 PC1. Check that all expected items and parts of the product are in the package. PC2. Remove all unwanted packaging and safely get rid of waste.  PC3. Gather the tools he/she needs for putting products together. PC4. Use safe work methods and follow manufacturers' instructions when putting products together. PC5. Check that products have been assembled correctly and can be used safely.  PC6. Ask the right person for help when products are proving difficult to put together. PC7. Check regularly that products on display are in a satisfactory condition. PC8. Promptly remove damaged products from display and follow company procedures for dealing with them.  Total  AS/N0118 Total  PC1. Take suitable opportunities to ask customers if they are members of the loyalty scheme and whether they are interested in joining.  PC2. Explain clearly and accurately to customers how joining the scheme would benefit them, including any current special offers relating to the scheme.  PC3. Respond positively to any questions or objections that the customer raises.  PC4. Provide relevant information to the customer to help them decide whether to join the scheme.  PC5. Treat the customer politely at all times and in a way that promotes goodwill.  PC6. Recognise accurately when customers are interested in		·		5	2.5	2.5
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10 5 5		·		5	2.5	2.5
joining the solicine.		PC6. Recognise accurately when customers are interested in joining the scheme.		10	5	5

	PC7. Take opportunities to ask customers who are showing signs of interest to sign up for the scheme.		10	5	5
	PC8. Fill in the membership application accurately with the customer, using the information they provide.		10	5	5
	PC9. Give the customer proof of their membership.		10	5	5
	PC10. Check with the customer that their details, as shown on the membership documentation, are correct.		10	5	5
	PC11. Give application forms to customers who show interest but are not willing to join the scheme there and then.		10	5	5
	Total		100	50	50
RAS/N0119 To	PC1. Notice and correctly identify security risks.		20	10	10
keep the store secure	PC2. Follow company procedures for reporting security risks.		20	10	10
	PC3. Report security risks to the right people promptly and accurately.	100	20	10	10
	PC4. Follow company procedures for preventing security risks while working.		20	10	10
	PC5. Notice where stock may have been stolen and tell the right person about it.		20	10	10
	Total		100	50	50
RAS/N0121 To maintain	PC1. Notice and correctly identify accidents and emergencies.		5	2.5	2.5
health and	PC2. Get help promptly and in the most suitable way.		5	2.5	2.5
safety	PC3. Follow company policy and procedures for preventing further injury while waiting for help to arrive.		5	2.5	2.5
	PC4. Act within the limits of his/her responsibility and authority when accidents and emergencies arise.		5	2.5	2.5
	PC5. Promptly follow instructions given by senior staff and the emergency services.		10	5	5
	PC6. Follow company procedures and legal requirements for reducing health and safety risks as far as possible while working.		10	5	5
	PC7. Use safety equipment correctly and in the right situations.	100	5	2.5	2.5
	PC8. Get advice and help from the right people when he/she concerned about his ability to work safely.		10	5	5
	PC9. Take suitable safety measures before lifting to protect himself/herself and other people.		10	5	5
	PC10. Use approved lifting and handling techniques.		10	5	5
	PC11. Check that any equipment he/she needs to use is fit for use.		5	2.5	2.5
	PC12. Use lifting and handling equipment in line with company guidelines and manufacturers' instructions.		5	2.5	2.5
	PC13. Plan a safe and efficient route for moving goods.		10	5	5

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	PC14. Make sure that he/she understands his/her responsibilities when he/she asks others to help in lifting and handling operations.		5	2.5	2.5
	Total		100	50	50
RAS/N0123 To keep the store clean and hygienic	PC1. Get the equipment and materials that are suitable for the surfaces that need cleaning.		5	2.5	2.5
	PC2. Safely position the cleaning equipment and materials and any items he/she must move.		5	2.5	2.5
	PC3. Keep the risk of spillages to a minimum and clean up any spillages promptly and thoroughly.		10	5	5
	PC4. Get rid of rubbish and waste promptly and safely.		5	2.5	2.5
	PC5. Disturb other people as little as possible while cleaning.		5	2.5	2.5
	PC6. Check that surfaces are thoroughly clean.		10	5	5
	PC7. Store cleaning equipment and materials correctly and promptly when he/she has finished cleaning.		5	2.5	2.5
	PC8. Use suitable equipment to tidy work areas.	100	5	2.5	2.5
	PC9. Check that equipment is safe to use before starting to use it.		5	2.5	2.5
	PC10. Get rid of waste and litter safely and in line with company procedures.		5	2.5	2.5
	PC11. Disturb other people as little as possible while getting rid of waste and litter.		10	5	5
	PC12. Store equipment correctly and promptly after use.		5	2.5	2.5
	PC13. Wear protective clothing that is clean and suitable for the work he/she needs to do.		10	5	5
	PC14. Dispose correctly of used clothing and products.		5	2.5	2.5
	PC15. Use effective practices and techniques for keeping his/ her hair, skin and nails clean enough for the work he/she does.		10	5	5
	Total		100	50	50
RAS/N0124 To provide	PC1. Acknowledge promptly and politely customers' requests for information and advice.		10	5	5
information	PC2. Identify the customer's needs for information and advice.		10	5	5
and advice to customers	PC3. Communicate information and advice to customers in ways they can understand.		10	5	5
	PC4. Provide information and advice to customers that is relevant, complete, accurate and up to date.	100	10	5	5
	PC5. Check politely that the information and advice provided meets the customer's needs.		10	5	5
	PC6. Find other ways to help the customer when the information and advice given is not satisfactory.		10	5	5

		Refer requests for information or advice to the right person when he/she cannot help the customer.		5	2.5	2.5
		Identify the nature of the complaint from information obtained from customers.		10	5	5
		Acknowledge the complaint clearly and accurately and applogise to the customer.		5	2.5	2.5
		Follow legal requirements and company policies and procedures for dealing with complaints.		10	5	5
		When it is not his/her responsibility to sort complaints, refer them promptly to the right person & explain the referral procedure clearly to the customer.		10	5	5
	Total			100	50	50
RAS/N0130 To create a		Meet the organisation's standards of appearance and behaviour.		5	2.5	2.5
positive image of self &	PC2.	Greet customers respectfully and in a friendly manner.		5	2.5	2.5
organisation in the customers		Communicate with customers in a way that makes them feel valued and respected.		10	5	5
mind		Identify and confirm your customer's expectations.		5	2.5	2.5
	PC5.	Treat customers courteously and helpfully at all times.		5	2.5	2.5
	PC6.	Keep customers informed and reassured.		5	2.5	2.5
		Adapt his/her behaviour to respond effectively to different customer behaviour.		10	5	5
	PC8.	Respond promptly to a customer seeking assistance.		5	2.5	2.5
		Select the most appropriate way of communicating with customers.	100	5	2.5	2.5
		Check with customers that he/she has fully understood their expectations.		5	2.5	2.5
		Respond promptly and positively to customers' questions and comments		5	2.5	2.5
		Allow customers time to consider his/her response and give further explanation when appropriate.		5	2.5	2.5
	PC13.	Quickly locate information that will help customers.		5	2.5	2.5
		Give customers the information they need about the services or products offered by the organisation.		10	5	5
		Recognise information that customers might find complicated and check whether they fully understand.		5	2.5	2.5
		Explain clearly to customers any reasons why their needs or expectations cannot be met.		10	5	5
	Total			100	50	50

RAS/N0137	PC1. Display courteous and helpful behaviour at all times.		5	2.5	2.5
To work effectively in a	PC2. Take opportunities to enhance the level of assistance offered to colleagues		5	2.5	2.5
retail team	PC3. Meet all reasonable requests for assistance within acceptable workplace timeframes.		10	5	5
	PC4. Complete allocated tasks as required.		5	2.5	2.5
	PC5. Seek assistance when difficulties arise.		5	2.5	2.5
	PC6. Use questioning techniques to clarify instructions or responsibilities.		10	5	5
	PC7. Identify and display a non discriminatory attitude in all contacts with customers and other staff members.	100	5	2.5	2.5
	PC8. Observe appropriate dress code and presentation as required by the workplace, job role and level of customer contact.		5	2.5	2.5
	PC9. Follow personal hygiene procedures according to organisational policy and relevant legislation.		5	2.5	2.5
	PC10. Interpret, confirm and act on workplace information, instructions and procedures relevant to the particular task.		5	2.5	2.5
	PC11. Interpret, confirm and act on legal requirements in regard to anti-discrimination, sexual harassment and bullying.		10	5	5
	PC12. Ask questions to seek and clarify workplace information.		5	2.5	2.5
	PC13. Plan and organise daily work routine within the scope of the job role.		10	5	5
	PC14. Prioritise and complete tasks according to required timeframes.		10	5	5
	PC15. Identify work and personal priorities and achieve a balance between competing priorities.		5	2.5	2.5
	Total		100	50	50

## Do



- Explain each Guideline for Assessment in detail
- Explain the score that each trainee needs to obtain
- Recapitulate each NOS one-by-one and take participants through the allocation of marks for Theory and Skills Practical.
- Explain the Allocation of Marks. Explain that they will be assessed on Theory and Skills Practical.
- Explain that for the first NOS, 50 marks are allotted for Theory and 50 for Skills Practical.

Notes ————————————————————————————————————











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