

Training Package	Retail Services (SIR07)		HSC Requirements and Advice
Unit title	Apply retail office procedures		
Unit code	Competency field	Sector	HSC Indicative Hours 15
SIRXADM001A	Administration	Cross-Sector	

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply retail office procedures. It involves processing mail, operating office equipment, filing and retrieving documents, establishing contact with customers and preparing simple correspondence.
Prerequisite units	Nil
Application of the unit	This unit may apply to both sales and administrative staff. It requires the team member to demonstrate the ability to operate and maintain office equipment, receive and dispatch correspondence in a variety of formats, file and retrieve documents, communicate with internal and external customers, and prepare simple correspondence according to store policy and procedures.
Employability Skills	The required outcomes described in this unit contain applicable facets of Employability Skills. The <i>Employability Skills Summary</i> of the qualification in which this unit is packaged will assist in identifying Employability Skill requirements.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Context of and specific resources for assessment	Methods of assessment	Assessing Employability Skills
Evidence of the following is <u>essential</u> : <ul style="list-style-type: none"> • applies procedures for the processing of mail, including bulk mail • operates and maintains office equipment according to store policy and procedures • files and retrieves documents according to store policy and procedures • follows procedures for establishing contact with internal and external customers • applies procedures for the preparation of simple correspondence. 	Assessment <u>must</u> ensure access to: <ul style="list-style-type: none"> • a real or simulated work environment • relevant documentation, such as: <ul style="list-style-type: none"> - store policy and procedures manuals - manufacturer instructions and operation manuals • a range of retail equipment. 	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: <ul style="list-style-type: none"> • observation of performance in the workplace • a role play • third-party reports from a supervisor • customer feedback • answers to questions about specific skills and knowledge • review of portfolios of evidence and third-party workplace reports of on-the-job performance. 	Employability Skills are integral to effective performance in the workplace and are broadly consistent across industry sectors. How these skills are applied varies between occupations and qualifications due to the different work functions and contexts. Employability Skills embedded in this unit should be assessed holistically in the context of the job role and with other relevant units that make up the skill set or qualification.

		Methods of assessment cont/d	
		Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: <ul style="list-style-type: none"> • SIRXICT001A Operate retail technology • SIRXFIN002A Perform retail finance duties. 	

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

The following skills must be assessed as part of this unit:

- operating a range of office technology
- organising work tasks
- completing tasks in a set timeframe
- literacy and numeracy skills in regard to:
 - processing, recording and documenting information
 - generating a range of retail documents
- interpersonal communication skills to:
 - report equipment faults
 - answer telephone calls and keep customers informed of delays and action being taken through clear and direct communication
 - ask questions to identify and confirm requirements
 - share information
 - use language and concepts appropriate to cultural differences
 - use and interpret non-verbal communication.

The following knowledge must be assessed as part of this unit:

- store policy and procedures in regard to:
 - store administration and clerical systems
 - receiving and dispatching incoming and outgoing mail
 - processing information
 - reporting problems and faults
- relevant regulatory and licensing requirements such as:
 - OHS
 - privacy policies.

Element	Performance Criteria	Range Statement
1 Process incoming and outgoing mail	1.1 <i>Sort and dispatch incoming mail</i> to nominated recipients or locations.	<p>The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. <i>Bold italicised</i> wording in the Performance Criteria is detailed below.</p> <p>Procedures to <i>sort and dispatch incoming mail</i> may relate to:</p> <ul style="list-style-type: none"> • internal systems • Australia Post • courier services.
	1.2 Collect and check outgoing mail to ensure all items are correctly prepared for dispatch.	
	1.3 Record mail according to <i>store policy and procedures</i> .	<p><i>Store policy and procedures</i> <u>in regard to</u>:</p> <ul style="list-style-type: none"> • store administration • clerical systems • operating and maintaining retail equipment.
	1.4 Dispatch mail within designated time limits.	
2 Process bulk mail	2.1 Collate documents as required.	
	2.2 Sort and batch envelopes according to Australia Post specifications.	
	2.3 Lodge batched items for delivery.	
3 Operate office equipment	3.1 Identify appropriate <i>equipment</i> for intended application.	<p><i>Equipment</i> may include:</p> <ul style="list-style-type: none"> • fax machine • telephone system • photocopier • answering machine or voicemail • public address system • paging system • franking machine • typewriters • computers • calculators • adapted equipment for people with a disability, for example, talking calculators, computer hard and software, and TTY.

Element	Performance Criteria	Range Statement
	3.2 Operate equipment according to manufacturer instructions.	
	3.3 Identify and rectify equipment faults or report to <i>relevant personnel</i> .	<i>Relevant personnel</i> may include: <ul style="list-style-type: none"> • supervisor • team leader • manager.
	3.4 Follow opening and shutdown processes according to store procedures.	
	3.5 Apply maintenance program for equipment to ensure down time is minimised.	
4 File and retrieve documents	4.1 <i>File documents</i> according to store policy.	Systems used to record or <i>file documents</i> may be: <ul style="list-style-type: none"> • manual • electronic.
	4.2 Identify and retrieve documents as requested.	
	4.3 Update and modify existing records.	
	4.4 Remove, process and store designated inactive files according to store policy.	
	4.5 Assemble new files.	
	4.6 Record movements of documentation.	
5 Establish contact with internal and external customers	5.1 Use telephone system functions according to store policy.	
	5.2 Obtain and accurately record telephone and fax number or email address.	
	5.3 Answer incoming calls promptly and according to store policy.	

Element	Performance Criteria	Range Statement
	5.4 Establish and clearly convey purpose of <i>contact</i> .	<p><i>Contact</i> may be established by:</p> <ul style="list-style-type: none"> • telephone • fax • email • letter • face-to-face contact.
	5.5 Transfer or place calls on hold as required.	
	5.6 Keep customers informed of delays and action being taken.	
	5.7 Record messages accurately and promptly return calls if required.	
6 Prepare simple correspondence	6.1 Prepare and present correspondence for approval or signature according to set timeframes.	
	6.2 Write text using clear, concise language.	
	6.3 Use correct spelling, punctuation and grammar.	
	6.4 Use standard form letters according to store policy.	