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<th>Training Package</th>
<th>Retail Services (SIR07)</th>
<th>HSC Requirements and Advice</th>
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<tr>
<td>Unit title</td>
<td>Maintain and order stock</td>
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<tr>
<td>Unit code</td>
<td>SIRXINV002A</td>
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<td>Competency field</td>
<td>Inventory</td>
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**Unit descriptor**
This unit describes the performance outcomes, skills and knowledge required to maintain and order stock in a retail environment. It involves monitoring receipt and dispatch of goods, maintaining stock records, coordinating stocktake, identifying stock losses, processing orders and following up on orders.

**Prerequisite units**
Nil

**Application of the unit**
This unit requires staff to exercise managerial responsibility to monitor and coordinate stock levels, storage, distribution and reorder cycles; roster staff, organise and coordinate stocktakes, maintain accurate records and routinely report on inventory status to relevant personnel in accordance with store policy and procedures.

**Employability Skills**
The required outcomes described in this unit contain applicable facets of Employability Skills. The Employability Skills Summary 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
- consistently implements and monitors store policy and procedures regarding receipt, dispatch and secure storage of goods
- regularly monitors staff implementation of store procedures and documentation in regard to receipt, dispatch and secure storage of goods
- monitors stock levels, storage, movement and reorder cycles on a regular basis
- organises and coordinates stocktake according to store policy and procedures

### Context of and specific resources for assessment
- a retail work environment
- relevant documentation, such as:
  - store policy and procedures for receipt and dispatch of goods
  - store procedures for stocktake
  - OHS legislation and codes of practice
  - industry codes of practice
  - legislation and statutory requirements
  - store merchandising and marketing policy and procedures
  - inter- and intra-store and department

### Methods of assessment
A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:
- observation of performance in the workplace
- third-party reports from a supervisor
- written or verbal questioning to assess knowledge and understanding
- review of portfolios of evidence and third-party workplace reports of on-the-job performance.

### Assessing Employability Skills
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.
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<tr>
<th>Critical aspects for assessment and evidence required to demonstrate competency in this unit cont/d</th>
<th>Context of and specific resources for assessment cont/d</th>
<th>Methods of assessment cont/d</th>
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</table>
| • consistently raises and processes stock orders and maintains record system according to store policy and procedures  
• monitors delivery processes and distributes stock to ensure continuity of supply. | transfer procedures  
- store quality control procedures and requirements. | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |
## 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:

- store stocktaking systems
- use of electronic recording equipment
- interpersonal communication skills:
  - inform team members of their responsibilities and give instructions
  - explain policies and procedures to staff
  - allocate tasks and provide directions for performance of tasks
  - liaise with buyers, store and departments, warehouse and suppliers through clear and direct communication
  - ask questions to identify and confirm requirements
  - use language and concepts appropriate to cultural differences
  - use and interpret non-verbal communication
- time management
- negotiation skills
- report preparation and presentation
- literacy and numeracy skills in regard to:
  - stock control reports and documentation
  - processing orders
  - maintaining delivery and supply records
  - stock distribution records
  - maintaining stock ordering and recording systems.

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

- store policy and procedures in regard to:
  - stock control
  - store merchandising system
  - current and future stock levels
  - bar codes, labels and price tags
  - store stock recording system
  - stock replenishment and reorder procedures
  - inter- and intra-store and department transfers
  - reporting of stock discrepancies and damage
  - identifying and recording stock losses
  - identifying and recording discrepancies
  - existing suppliers
  - quality control procedures and requirements
  - receipt and dispatch of goods, including inspection for quality and quantity
- relevant licensing requirements for moving stock mechanically
- relevant legislation and statutory requirements
- relevant industry codes of practice
- relevant OHS legislation and codes of practice
- principles and techniques for interpersonal communication skills.
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<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
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</table>
| 1 Monitor receipt and dispatch of goods | 1.1 Delegate responsibility for receipt and dispatch of goods to *appropriate staff.* | The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. *Bold italicised* wording in the Performance Criteria is detailed below. *Appropriate staff* may include:  
- frontline staff  
- relevant manager  
- supervisor  
- team leader  
- specialist staff. |
| 1.2 Implement store procedures in regard to receipt, dispatch and secure storage of goods. | | |
| 1.3 Observe *staff* functions to ensure store procedures are followed and documentation is completed correctly. | *Staff* may include:  
- full-time, part-time, casual or contract staff  
- people from a range of social, cultural and ethnic backgrounds  
- people with varying degrees of language and literacy levels. | |
| 1.4 Implement store procedures to ensure goods inspected for quantity and quality on receipt. | | |
| 1.5 Act upon variations to quantity and quality of delivered goods according to *store policy and procedures.* | *Store policy and procedures* in regard to:  
- stock control  
- stock control system  
- recording procedures  
- procedures for investigating discrepancies  
- store merchandise and marketing  
- pricing, labelling and packaging requirements  
- quality control policy and procedures. | |
| 1.6 Supervise safe *handling and storage of goods* according to store policy. | *Handling and storage of goods* may vary according to:  
- stock characteristics  
- industry codes of practice. | |
<p>| 2 Maintain stock records | 2.1 Monitor and maintain stock levels at required levels. | |</p>
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<tbody>
<tr>
<td>2.2</td>
<td>Maintain, monitor and adjust stock reorder cycles as required.</td>
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<td>2.3</td>
<td>Inform team members of their individual responsibilities in regard to recording of stock.</td>
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| 2.4     | Maintain stock storage and movement **records** according to store policy. | **Records** may be:  
- manual  
- digital. |
| 2.5     | Record stock discrepancies and follow procedures according to store policy. |  |
| 2.6     | Monitor stock performance and identify and **report** fast and slow selling items according to store policy. | **Reports** for management may include:  
- financial reports  
- business documents  
- informal reports  
- stocktake reports. |
| 3       | Coordinate stocktake or cyclical count |  |
| 3.1     | Interpret policy and procedures in regard to **stocktaking** and cyclical counts and explain to team members. | **Stocktaking** may be:  
- cyclical  
- compliance driven. |
| 3.2     | **Roster** staff according to allocated budget and time constraints. | **Roster** may include:  
- varying levels of staff training  
- staffing levels  
- routine or busy trading conditions  
- full-time, part-time or casual staff  
- range of staff responsibilities. |
<p>| 3.3     | Allocate stocktaking tasks to individual team members. |  |
| 3.4     | Provide team members with clear directions for the performance of each task. |  |
| 3.5     | Allocate team members to ensure effective use of staff resources to complete task. |  |</p>
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<td><strong>3.6</strong> Produce accurate reports on stocktake data, including discrepancies, for management.</td>
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| **4** Identify stock losses | 4.1 Identify, record and assess losses against potential loss forecast on a regular basis.  
4.2 Identify avoidable losses and establish reasons.  
4.3 Recommend and implement possible solutions. |                  |
| **5** Process orders | 5.1 Process and raise orders for stock as requested according to store policy and procedures.  
5.2 Maintain *ordering and recording system*.  
*Ordering and recording system* may be:  
• manual  
• digital.  
5.3 Ensure availability of sample range according to buying plan.  
5.4 Order pricing materials as required.  
5.5 Record negotiated purchase and supply agreements and file for retrieval. |                  |
| **6** Follow up orders | 6.1 Monitor delivery process to meet agreed deadlines.  
6.2 Handle routine supply problems or refer to management as required by store policy.  
6.3 Maintain ongoing liaison with buyers, store and departments, warehouse and *suppliers* to ensure continuity of supply.  
*Suppliers* may include:  
• existing contacts  
• new contacts  
• local suppliers  
• overseas supplies.  
6.4 Distribute stock according to store or department allocation. |                  |