



PIABC LEVEL 3 NVQ CERTIFICATE IN MERCHANT SUPPLIES - TIMBER

Qualification Number: 601/4021/5

Qualification Specification

Updated: 21 March 2018

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EXECUTIVE SUMMARY

The PIABC Level 3 Certificate in Merchant Supplies – Timber is a nationally recognised qualification. The primary purpose of the qualification is to confirm specialist knowledge and skills competence. It enables individuals to demonstrate specific competence and knowledge appropriate for the day to day activities in a merchanting environment dealing with the management of timber and timber based panel products. Specific products may include, for example: sawn timber stock and specials, planed timber, mouldings, windows, frames, flooring, doors, stairs, panels.

The PIABC Level 3 NVQ Certificate in Merchants Supplies - Timber is a national qualification consisting of mandatory and optional units. Mandatory units such as health and safety, sustainable business practice and compliance confirm competence and related job knowledge in the workplace. Candidates then choose units from lists to match their own job role. These job-specific units confirm both skills competence and the necessary related job knowledge – such examples may be: Forecasting development; Stock; Purchasing/Sourcing; Sales; Customer requirements.

By the end of the qualification, the candidate should be competent in the job role and have a good understanding of the related job knowledge associated with the role – including terminology, materials, machinery, equipment and processes.

It provides learners with skills and knowledge for a number of job roles: trade counter, estimator, purchasing, sales and yard operatives. It particularly provides a

This qualification has been developed with employer's advice. Typically, this qualification will suit the following employees:

1. People recently employed in the industry who want to gain a sound foundation to the materials, and management processes that are central to timber supply chain to enable them to operate more effectively. Including Apprentices.
2. People who have been in the industry for some time who want to extend their knowledge and/or gain a recognised qualification.

There is no necessity for any formal entry requirement to this qualification beyond the basic literacy and numeracy expected from anyone entering the wood industry; however candidates may wish to do the PIABC Level 2 NVQ Certificate in Merchant Supplies – Timber, depending upon individual circumstances. There are no age restrictions for this qualification

To achieve the qualification, learners need to successfully gain 31 credits made up from mandatory and optional units.

Programmes leading to the qualification can be organised and delivered by providers who have gained centre and qualification approval from PIABC. To achieve this they need to complete the PIABC centre and qualification approval procedures available from www.piabc.org.uk. In completing the documentation and the approval visit, centres need to demonstrate their ability to deliver high quality education leading to the qualification. Centres are expected to employ robust quality assurance processes. PIABC will appoint its own moderators to ensure the effective operation of these processes and the maintenance of standards of quality.

This qualification was developed under the Qualifications Credit Framework (QCF) and comprises of units from a number of Sector Skills Councils and therefore Assessors should use the associated relevant Assessment Strategies.

AIM

The PIABC Level 3 Certificate in Merchant Supplies – Timber is a nationally recognised qualification. The primary purpose of the qualification is to confirm specialist knowledge and skills competence. It enables individuals to demonstrate specific competence and knowledge appropriate for the day to day activities in a merchanting environment dealing with the management of timber and timber based panel products.

The PIABC Level 3 NVQ Certificate in Merchants Supplies - Timber is a national qualification consisting of mandatory and optional units. Mandatory units such as health and safety, sustainable business practice and compliance confirm competence and related job knowledge in the workplace. Candidates then choose units from lists to match their own job role. These job-specific units confirm both skills competence and the necessary related job knowledge – such examples may be: Forecasting development; Stock; Purchasing/Sourcing; Sales; Customer requirements.

OUTCOMES

In setting out a clearly-defined level of achievement, this qualification will:

1. The primary purpose of the qualification is to confirm specialist knowledge and skills competence.
2. Enhance the knowledge and job satisfaction of learners- providing them with a means of progression to higher level job roles and qualifications.
3. Provide employers with an open and transparent basis for judging the suitability of learners for employment and promotion.
4. Facilitate job movement throughout the timber sector and other related areas of the timber industry.

Specific outcomes for the qualification are listed under the individual unit description.

TARGET GROUP

Indication of Job title(s) Job role(s)

- Trade Counter: Responsible for customer service to Trade and Public on product knowledge and pricing and communicating effectively with customers ensuring their requirements are met
- Estimator: Responsible for pricing accurately potential orders making sure the correct products are being used for new and existing customers
- Yard/Warehouse Operative: Ensuring safe movement of materials within a timber based workplace, responsible for the selecting and packaging of finished materials and products ready for shipping to customer's specifications.
- Sales Representative: Promotes/sells/ secures orders from existing and new customers.

ENTRY REQUIREMENTS

There is no necessity for any formal entry requirement to this qualification beyond the basic literacy and numeracy expected from anyone entering the wood industry; however candidates may wish to do the PIABC Level 2 NVQ Certificate in Merchant Supplies – Timber, depending upon individual circumstances. There are no age restrictions for this qualification.

Assessment for this qualification is open to any learner who has the potential to reach the standards laid down for this qualification. An initial assessment of past experience and current skills, knowledge and understanding should be carried out prior to commencement, to determine suitability for this qualification.

Aids or appliances, which are designed to alleviate disability, may be used during assessment, providing they do not compromise the standard required.

PROGRESSION

Success in this qualification will confirm competence and improve confidence and prepare for Further Education Level 4 related industry qualifications.

Learners are encouraged to consider belonging to a professional institute or similar. Centres are encouraged to make learners aware of relevant associations and related professional bodies.

QUALIFICATION STRUCTURE

The qualification was developed under the Qualifications Credit Framework (QCF) and comprises of units from a number of Sector Skills Councils and therefore Assessors should use the associated appropriate Assessment Strategies.

The qualification is made up of mandatory and optional units. The mandatory units cover those areas which have a common approach, such as safety and the principle learning outcomes for the job role. The optional units offer a choice that can be combined to meet the needs of an individual's specific job role together with the organisations and learners preferences.

Guided Learning Hours (GLH) is the number of hours of teacher supervised or directed study time required to teach an individual unit or qualification. GLH have been calculated unit by unit -in isolation of each other - such that the unit is a standalone unit, therefore centres may find that where learners are completing a number of units to achieve the complete qualification actual overall GLH will reduce (i.e. the actual GLH for the entire qualification is unlikely to be a sum total of the individual units taken).

Learning time will clearly be reduced if learners hold QCF credits from prior learning. Learners will also be expected to carry out additional reading, practice and other work to complete each unit and prepare for assessment.

Credit values are determined by the total learning hours (teaching + demonstrations + practice + reflection + assessment - including developing competence in the work environment etc) divided by 10. For example 7 credits reflect a total learning time of 70 hours. Learning time is usually much greater than GLH. Credit values have been calculated unit by unit - in isolation of each other - such that the unit is a stand alone unit; therefore centres may find that where learners are completing a number of units to achieve the complete qualification, actual learning time will reduce (i.e. the actual learning time for the entire qualification is unlikely to be a sum total of the credits of the individual units taken).

Rules of Combination are used to define the structure of QCF qualifications and specify the minimum credits which must be achieved through a particular combination of units to gain a full qualification.

RULES OF COMBINATION

Learners must achieve all units in the mandatory group (17 credits), plus a minimum of 14 credits from the job-related optional group. The total minimum credit value of this qualification is 31 credits.

Ref	Unit Title	Level	Credit
Mandatory Units: 17 credits required			
L5066134	Ensure compliance with legal, regulatory, ethical and social requirements in wood operations	3	9
L5066027	Promote and maintain health, safety and the environment within the working environment	3	5
M5066028	Contribute to sustainable business practice	2	3
Option Group: 14 credits required			
R5066135	Source timber and timber based products in a commercial environment	3	10
H5066138	Timber and related products stock control and movement	3	8
F5038086	Purchasing timber and timber based products in a commercial environment	2	10
Y6011230	Organise the delivery of reliable customer service	3	6
R5059721	Forecasting trends and developments impacting on range management and buying	4	8
Y5059722	Forecasting product sales, stock and profit levels	4	8
H5066026	Production planning in the wood industry	3	16
T5035671	Source required goods and services in a retail environment	3	10
T5028638	Assessing customers' credit status	3	4
K6017596	Schedule logistics operations to meet customers requirements	3	4
T5028641	Leading a sales or marketing team	3	4

QUALIFICATION LEVEL

This is a Level 3 qualification based upon the QFC.

Level 3 Descriptor Summary

Achievement at Level 3 reflects the ability to identify and use relevant understanding, methods and skills to complete tasks and address problems that, while well defined, have a measure of complexity. It includes taking responsibility for initiating and completing tasks and procedures as well as exercising autonomy and judgement within limited parameters. It also reflects awareness of different perspectives or approaches within an area of study or work.

Source: Regulatory arrangements for the Qualifications and Credit Framework OFQUAL 2008

PROGRAMME ORGANISATION

Programmes leading to the PIABC Level 3 NVQ Certificate in Merchant Supplies - Timber can be organised and delivered by providers who have gained centre and qualification approval from PIABC. To achieve this they need to complete the PIABC centre and qualification approval procedures available from www.piabc.org.uk. In completing the documentation and the approval visit, centres need to demonstrate their ability to deliver high quality education leading to the qualification. Centres are expected to employ robust quality assurance processes. PIABC will appoint its own moderators to ensure the effective operation of these processes and the maintenance of standards of quality.

The organisation of the qualification is at the discretion of the centre and will take into account the aims, aspirations and experience of the learners.

Centres are encouraged to choose the most suitable curriculum model for their learners. Whilst the sequential delivery of parts of the unit is a possibility and may provide the most straightforward way of determining completion, it may be that some degree of integration of elements will occur, or that other methods of delivery are more appropriate to meet the needs of learners. It should be noted however that the whole unit and all the learning outcomes will be assessed.

Centres must ensure that adequate arrangements are in place for supporting learners. This could be either through separate tutorial sessions or through the use of time within structured study sessions. Centres using on-line or other forms of open learning must ensure that appropriate tutorial support is provided for learners.

The employer's engagement in learning and assessment opportunities will be paramount in securing timely achievement and a participative role should be encouraged.

In relevant circumstances, centres are recommended to provide career related information and guidance to their learners.

GUIDANCE ON LEARNING AND TEACHING

Learners employed in the timber and related industries will come to the qualification with varying levels of existing knowledge and/or practical experience of some parts of the Learning Outcomes. Training needs should be identified and gaps in knowledge and competency should be filled with a planned delivery of an individual learning plan. This should be utilised in preparing for teaching and assessment. The sharing of knowledge which has the potential to lead to a high level of understanding should be encouraged by the use of staff with direct experience in the Merchant Supplies – Timber and related industries. This must, of course, be balanced against a sound understanding of the theoretical understanding.

The relationship between theory and practice is a theme that should be reflected in the assessments for the programme. Therefore in structured learning and individual work, learners should be aware of the requirement to develop a theoretical understanding to their practical work and a practical application to their theoretical understanding.

Those developing learning programmes should expect to achieve all the learning outcomes. It may be useful to have workbooks for use either at home or in the workplace.

QUALIFICATION DESCRIPTION

The PIABC Level 3 NVQ Certificate in Merchant Supplies - Timber follows the QCF principles for designing units and qualifications and contains the features listed as follows:

- Unit QCF reference number, title, level, guided learning hours and credit value.
- Each unit consist of:
 - Learning Outcomes that show what the Learners will be able to understand, know or demonstrate.
 - Assessment Criteria that show what the Learners can do or produce in order to show that they have met the learning outcome.
 - Some Units also indicate the intended scope of the performance criteria
- To successfully complete a unit, learners must meet all the learning outcomes by showing that they have achieved all the assessment criteria with consideration to the intended scope.

UNIT CONTENT: LEARNING OUTCOMES AND ASSESSMENT CRITERIA

The PIABC Level 3 NVQ Certificate in Supplies - Timber is a nationally recognised qualification which requires the candidate to possess or acquire the competencies and knowledge in one of either: purchasing, selling or handling timber and timber based products

ENSURE COMPLIANCE WITH LEGAL, REGULATORY, ETHICAL AND SOCIAL REQUIREMENTS IN WOOD OPERATIONS

Unit Accreditation No: L5066134
Unit Level: 3

Guided Learning Hours: 36
Unit Credits: 9

1. Be able to ensure compliance with legal, regulatory, ethical and social requirements in wood operations

- 1.1. Obtain information from suitable sources on the current organisational and operational procedures
- 1.2. Make sure relevant people have a clear understanding of the policies and procedures and the importance of putting them into practice
- 1.3. Monitor the way policies and procedures are put into practice and provide support
- 1.4. Identify and correct any failures to meet the requirements
- 1.5. Identify reasons for not meeting requirements and adjust the policies and procedures to reduce the likelihood of failures in the future
- 1.6. Provide reports about any failures to meet the requirements to the relevant stakeholders
- 1.7. Recognise changes in circumstances promptly and adjust plans and activities accordingly
- 1.8. Make time available to support others
- 1.9. Give feedback to others to help them improve their performance
- 1.10. Identify and raise ethical concerns
- 1.11. Identify potential risks to compliance with legal, regulatory, ethical and social requirements
- 1.12. Make appropriate information and knowledge available promptly to those who need it and have a right
- 1.13. Encourage others to share information and knowledge within the constraints of confidentiality
- 1.14. Show sensitivity to stakeholders needs and manage these effectively

2. Understand how to ensure compliance with legal, regulatory, ethical and social requirements in wood operations

- 2.1. Describe the methods of monitoring developments in legislation and regulations
- 2.2. Explain the importance of having an ethical and value based approach to governance and how to put this into practice
- 2.3. Explain the relevant organisational and operational procedures
- 2.4. Describe the organisations approach to current and emerging social attitudes to management and leadership practice and the importance of being sensitive to these
- 2.5. Describe the regulatory, ethical and operational requirements both national and international
- 2.6. State the procedures to follow if you do not meet the requirements
- 2.7. Suggest ways in which other organisations deal with current and emerging social concerns and expectations
- 2.8. Describe the culture and values of your organisation and what effect they have on corporate governance
- 2.9. Explain how policies and procedures make sure people meet the requirements

2.10. Describe the processes for maintaining the relevant policies and procedures and making sure they continue to be effective and sustainable

2.11. Describe the different ways in which people may not meet the requirements and the risks of these actually happening

2.12. State the procedures for dealing with people who do not meet the requirements, including requirements for reporting

PROMOTE AND MAINTAIN HEALTH, SAFETY AND THE ENVIRONMENT WITHIN THE WORKING ENVIRONMENT

Unit Accreditation No: L5066027
Unit Level: 3

Guided Learning Hours: 14
Unit Credits: 5

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| 1. Be able to promote and maintain health, safety and the environment | <ul style="list-style-type: none">1.1. Follow the regulations and guidelines for health and safety protection1.2. Carry out risk assessments and report findings to the appropriate person/authority1.3. Ensure the immediate work area is free from health and safety hazards1.4. Identify promptly any health and safety hazards and report them to an appropriate authority1.5. Take suitable action to prevent harm to individuals1.6. Plan and organise safe working practices1.7. Select and use safety equipment and personal protective equipment correctly1.8. Follow manufacturers' and other relevant instructions relating to the safe use of equipment and materials1.9. Monitor organisational changes in health and safety regulations and guidelines and implement their requirements as soon as possible1.10. Monitor colleagues to ensure they comply with health and safety requirements |
| 2. Know how to promote and maintain health, safety and the environment | <ul style="list-style-type: none">2.1. Outline the relevant health and safety regulations and guidelines2.2. Outline the health and safety hazards that could be found in the workplace2.3. State who should be informed of health and safety hazards2.4. Differentiate between safe and unsafe working practices2.5. Outline the type of safety equipment and personal protective equipment that should be used in different situations2.6. State who is authorised to enter dangerous and/or hazardous areas2.7. State how to obtain information on changes to relevant health and safety regulations and guidelines2.8. Describe how to monitor colleagues complying with health and safety requirements2.9. Describe the duties of employers and employees in relation to health and safety2.10. Describe what health surveillance procedures are available and where to obtain information and training on them2.11. Outline the health and safety procedures for visitors2.12. State what information systems should be used2.13. State why it is important to use the information systems |
| 3. Know how to deal with incidents and accidents | <ul style="list-style-type: none">3.1. Outline the standard operating procedures are for dealing with different types of emergency3.2. Describe how to alert the emergency services, and what type of information will need to be provided3.3. Outline the evacuation procedures for workers and visitors and where should people gather |

- 3.4. State who is authorised to use emergency equipment
- 3.5. State which equipment should be used for different types of emergency
- 3.6. State how to summon medical assistance
- 3.7. State who the qualified first aiders are
- 3.8. Outline the type of injuries that could occur
- 3.9. Describe the accident reporting procedures

CONTRIBUTE TO SUSTAINABLE BUSINESS PRACTICE

Unit Accreditation No: M5066028
Unit Level: 2

Guided Learning Hours: 10
Unit Credits: 3

1. Be able to contribute to sustainable business practice

- 1.1. Work effectively according to organisational procedures and production specifications
- 1.2. Assess own performance to identify opportunities for improving resource efficiency improvements
- 1.3. Report any opportunities to improve the efficiency of resource usage
- 1.4. Report any suspected inefficiency within organisational procedures or production specifications
- 1.5. Support the implementation of actions to improve the efficiency of resource usage within limits of own authority
- 1.6. Work to actively avoid and minimise waste

2. Know how to contribute to sustainable business practice

- 2.1. Explain what is meant by sustainable business practice
- 2.2. Outline organisational sustainability targets and their importance
- 2.3. Describe how organisational procedures and production specifications support sustainable business practice
- 2.4. Explain why resource usage efficiency is important to sustainability in relation to environmental, economic and social factors
- 2.5. Outline how to assess own performance to identify opportunities for improving resource usage efficiency
- 2.6. Explain the importance of reporting any suspected inefficiency within organisational procedures or production specifications
- 2.7. Explain how not working to organisational procedures and production specifications can impact on resource usage and sustainability
- 2.8. Suggest how to identify opportunities for improving resource usage efficiency
- 2.9. Suggest how to potential sources of waste within area of responsibility
- 2.10. Describe how waste is avoided and minimised through recycling and reuse
- 2.11. Explain how waste minimisation supports sustainability
- 2.12. Explain how the efficient use of resources supports the economic sustainability of the organisation
- 2.13. Outline the social benefits associated with sustainable business practice

SOURCE TIMBER AND TIMBER BASED PRODUCTS IN A COMMERCIAL ENVIRONMENT

Unit Accreditation No: R5066135
Unit Level: 3

Guided Learning Hours: 36
Unit Credits: 10

1. Be able to source timber and timber based products in a commercial environment

- 1.1. Check the suitability of suppliers following company procedures
- 1.2. Develop a due diligence system for compliance with current timber related legislation
- 1.3. Gather the information required to carry out due diligence
- 1.4. Carry out a risk assessment on the information gathered
- 1.5. Carry out due diligence on the products to be purchased in line with the current timber related legislation
- 1.6. Record information in the appropriate information systems
- 1.7. Programme and forecast stock levels
- 1.8. Interview suppliers to ensure that they meet your organisations needs
- 1.9. Negotiate payment terms, credit limits and rebate schemes with suppliers
- 1.10. Compare products from different suppliers

2. Understand how to legally source timber and timber based products in a commercial environment

- 2.1. Outline the main purposes of EU Timber Regulations
- 2.2. Explain how to carry out due diligence in line with the EU Timber Regulations
- 2.3. Outline the adverse effects of illegal logging
- 2.4. Describe how your company complies with the EU Timber Regulations
- 2.5. Outline the penalties for sourcing and purchasing illegal timber
- 2.6. Explain the purpose of Chain of Custody and why this is important
- 2.7. State who needs Chain of Custody Certificates
- 2.8. Compare the different Chain of Custody schemes and the differences between the standards
- 2.9. State the purpose of the CE Mark and explain why this is important
- 2.10. State why timber and timber based materials and products are subject to origin and supply control certification
- 2.11. State how timber and timber based materials and products are subject to origin and supply control certification
- 2.12. State the main geographical sources of supply timber and timber based materials and products
- 2.13. State what information should be recorded and why
- 2.14. State what information should be recorded and why
- 2.15. Describe how to interview suppliers to ensure that they meet your organisations needs
- 2.16. Describe how to negotiate payment terms, credit limits and rebate schemes with suppliers
- 2.17. Explain how to compare products from different suppliers and the specifications to use

TIMBER AND RELATED PRODUCTS STOCK CONTROL AND MOVEMENT

Unit Accreditation No: H5066138

Guided Learning Hours: 28

Unit Level: 3

Unit Credits: 8

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| 1. Be able to control stock and movement of timber and related products | <ol style="list-style-type: none">1.1. Monitor the levels of stock in line with company requirements1.2. Analyse stock records to identify the types and quantities of items that need replenishing1.3. Make justifiable recommendations for stocking new product lines to the relevant person, when appropriate1.4. Establish stock availability and lead times with suppliers accurately when placing an order1.5. Ensure the sourcing and ordering of stock meets company requirements and known and anticipated customer demands1.6. Order quantities of stock to maximise relevant supplier discounts and special offers1.7. Place orders with suppliers in a way and at a time to achieve maximum business advantage for own organisation1.8. Place orders at times which enable suppliers to pick and deliver requirements in line with their own systems and proceed1.9. Follow up all outstanding orders promptly in a way that maintains goodwill and positive working relationships with suppliers1.10. Ensure purchasing records are complete, accurate and up to date and can be accessed by other people who need to use them |
| 2. Understand how to work with timber – related stock data | <ol style="list-style-type: none">2.1. Explain how stock data is used to produce a suggested stock order report2.2. Show how to analyse stock reports and suggested orders2.3. Explain how to analyse 'lost sales' to identify potential demand for new product lines2.4. Illustrate how to make recommendations with clear, supporting information to justify them2.5. Identify the types of stock the organisation normally requires and stocks suppliers and their order systems |
| 3. Understand how to work with timber and panel products suppliers | <ol style="list-style-type: none">3.1. Explain how to evaluate the viability of supplier terms of business in order to achieve maximum business advantage to own organisation3.2. Describe how to communicate with suppliers assertively3.3. Show how to place orders using organisational systems and how to complete the appropriate purchasing records3.4. Explain the importance of using supplier special offers and bulk purchase terms to maximise the business advantage to own organisation wherever possible3.5. Outline the organisational systems and procedures for purchasing stock and stock ordering parameters3.6. Describe the factors that can influence customer demand for parts and their impact on the ordering process3.7. Describe the organisation's legal rights as a consumer3.8. Explain the business and customer satisfaction related factors governing why:<ul style="list-style-type: none">• deliveries should be checked promptly |

- shortfalls rectified promptly
- supplier performance is formally evaluated
- accurate purchasing records are maintained

3.9. Describe how to monitor and give feedback on, supplier performance

3.10. Outline the records own organisation keeps about suppliers' performance

PURCHASING TIMBER AND TIMBER BASED PRODUCTS IN A COMMERCIAL ENVIRONMENT

Unit Accreditation No: F/503/8086
Unit Level: 2

Guided Learning Hours: 57
Unit Credits: 10

Assessment Guidance

This unit must be assessed in a work environment and in accordance with:

- the Additional Requirements for Qualifications using the title NVQ in QCF
- the Proskills QCF Assessment Strategy

Workplace evidence of skills cannot be simulated.

Learning Outcomes and Assessment Criteria

Learning Outcome – Assessment Criterion - The learner can: The learner will:

- | | |
|---|---|
| 1. Prepare to purchase timber and timber based products | 1.1 Confirm type of order i.e. stock or none stock
1.2 Follow company procedures for checking the suitability of material to be supplied
1.3 Carry out calculations to ensure cost effectiveness of the intended purchase
1.4 Check the suitability of the delivery options available based on <ul style="list-style-type: none">• cost• frequency/timing of delivery• security• type(s) 1.5 Check the suitability of the storage available based on <ul style="list-style-type: none">• access for loading/unloading• safety• security• space available• specialist storage 1.6 Check the readiness for purchasing in relation to <ul style="list-style-type: none">• ownership of materials/products• terms of supply• terms of payment• eligibility of supply |
| 2. Know how to prepare to purchase timber and timber based products | 2.1 Describe job role including levels of responsibility, accountability, line management and reporting procedures
2.2 Explain how and why the procedures for stock and none stock differ
2.3 State the main characteristics affecting the wood purchasing decisions with regard to: <ul style="list-style-type: none">• material• transport• storage 2.4 Identify the common dimensions/pack sizes of timber and show the calculations needed to ensure cost effective purchasing |

Learning Outcome – Assessment Criterion - The learner can:
The learner will:

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| | 2.5 | Describe the procedures for <ul style="list-style-type: none"> • transfer of ownership/liability • despatch, carriage and delivery • credit/ payment options • minimum order values and quantities • chain of custody • certification |
| | 2.6 | Describe the purpose of Chain of Custody (CoC) and explain why this is important |
| | 2.7 | Describe the purpose of the CE Mark and explain why this is important |
| | 2.8 | Explain briefly why timber and timber based materials and products are subject to origin and supply control certification |
| | 2.9 | Explain briefly how timber and timber based materials and products are subject to origin and supply control certification |
| 3. Purchase timber and timber based products | 3.1 | Carry purchasing operations within the scope of personal responsibility and with due regard to production efficiency and business objectives |
| | 3.2 | Confirm the requirements for <ul style="list-style-type: none"> • materials • amounts • quality • dimensions • cost of materials and associated fixings |
| | 3.3 | Confirm the delivery arrangements for <ul style="list-style-type: none"> • delivery method • time and date • cost |
| | 3.4 | Confirm storage requirements for stock and none stock |
| | 3.5 | Confirm the payment method |
| | 3.6 | Complete all documentation accurately and legibly |
| | 3.7 | Follow the company procedures to complete the purchase of timber and timber based products |
| 4. Know how to purchase timber and timber based products | 4.1 | Explain the main functions of 4 documents and procedures when purchasing timber and timber based products |
| | 4.2 | With regard to value, explain the purpose of: <ul style="list-style-type: none"> • permitted industry recognise specification tolerances • unit cost calculations • negotiation • credit • wastage |
| | 4.3 | State the main statutory duties when purchasing timber and timber based products for the following: <ul style="list-style-type: none"> • Health and Safety • Data protection |
| | 4.4 | Describe how the health and Safety and Data Protection legislation and regulations relate to and affect your role |

Learning Outcome – Assessment Criterion - The learner can:
The learner will:

- 4.5 Describe how at least 1 product from each of the following are made:
 - panel/sheet materials
 - engineered products
 - component/joinery products
- 4.6 State the main geographical sources of supply of timber and timber-based materials and products
- 4.7 Identify the company documentation/computer systems and describe how these are completed and used
- 4.8 Describe company procedures for dealing with unsatisfied concerns

ORGANISE THE DELIVERY OF RELIABLE CUSTOMER SERVICE

Unit Accreditation No: Y6011230

Guided Learning Hours: 40

Unit Level: 3

Unit Credits: 6

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| 1. Plan and organise the delivery of reliable customer service | 1.1. Plan, prepare and organise everything they need to deliver services or products to different types of customers
1.2. Organise what they do to ensure that they are consistently able to give prompt attention to your customers
1.3. Reorganise their work to respond to unexpected additional workloads |
| 2. Review and maintain customer service delivery | 2.1. Maintain service delivery during very busy periods and unusually quiet periods
2.2. Maintain service delivery when systems, people or resources have let them down
2.3. Consistently meet their customers' expectations
2.4. Balance the time they take with their customers with the demands of other customers seeking their attention
2.5. Respond appropriately to their customers when customers make comments about the products or services they are offering
2.6. Alert others to repeated comments made by their customers
2.7. Take action to improve the reliability of their service based on customer comments
2.8. Monitor the action they have taken to identify improvements in the service they give to their customers |
| 3. Use recording systems to maintain reliable customer service | 3.1. Record and store customer service information accurately following organisational guidelines
3.2. Select and retrieve customer service information that is relevant, sufficient and in an appropriate format
3.3. Quickly locate information that will help solve a customer's query
3.4. Supply accurate customer service information to others using the most appropriate method of communication |
| 4. Understand how to organise the delivery of reliable customer service | 4.1. Describe organisational procedures for unexpected situations and their role within them
4.2. Describe resource implications in times of staff sickness and holiday periods and their responsibility at these times
4.3. Explain the importance of having reliable and fast information for their customers and their organisation
4.4. Evaluate the organisational procedures and systems for delivering customer service
4.5. Identify useful customer feedback and explain how to decide which feedback should be acted on
4.6. Describe how to communicate feedback from customers to others
4.7. Evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information
4.8. Explain the legal and regulatory requirements regarding the storage of data |

FORECASTING TRENDS AND DEVELOPMENTS IMPACTING ON RANGE MANAGEMENT AND BUYING

Unit Accreditation No: R5059722
Unit Level: 4

Guided Learning Hours: 64
Unit Credits: 8

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| <p>1. Understand the importance of forecasting trends and developments impacting upon the range management and buying requirements within their own organisation</p> | <p>1.1. Explain the importance of identifying trends and developments at an early stage, including the possible consequences of not doing so</p> <p>1.2. Explain the importance of monitoring potential trends and of updating forecasts accordingly</p> <p>1.3. Explain the relevance of trend to their market, including the trend cycle and positioning within it</p> <p>1.4. Explain the value and limitations of the various sources of information used in forecasting trends and developments</p> <p>1.5. Explain how the timing of a trend influences the retailing of products to their customer market</p> <p>1.6. Explain the importance of monitoring competitors' and customers' responses to identified trends and developments</p> |
| <p>2. Understand how to undertake effective forecasts of trends and developments</p> | <p>2.1. Describe tools used to analyse trends and developments in developing forecasts</p> <p>2.2. Explain how to analyse information to develop accurate forecasts</p> <p>2.3. Explain the importance of having accurate and current information on which to base their forecasts</p> <p>2.4. Identify with whom their own organisation requires them to share forecasts, and the format required</p> <p>2.5. Explain why it is important to develop a common understanding with colleagues regarding forecasted trends and developments, which can then be used to guide decision-making</p> |
| <p>3. Be able to identify emerging trends and developments relevant to their retail operations using available information</p> | <p>3.1. Gather information on possible trends and developments from a range of sources</p> <p>3.2. Demonstrate that the information which they gather on possible trends and development is reliable and up to date</p> <p>3.3. Identify emerging trends at an early stage, reviewing these at suitable intervals</p> |
| <p>4. Be able to make forecasts based upon emerging trends and developments</p> | <p>4.1. Develop forecasts which are evidence based and which take account of the accuracy and currency of the information</p> <p>4.2. Predict the likely direction, scale and timing of emerging trends and developments</p> <p>4.3. Monitor and assess the response which competitors and customers are making to identified trends and developments</p> <p>4.4. Evaluate the implications of forecasts in terms of threats to, and opportunities for, product categories within their area of responsibility</p> <p>4.5. Produce and share their forecasts with relevant others in line with the organisational requirements</p> <p>4.6. Liaise with others to develop a common understanding which can be used to guide decision-making</p> |

FORECASTING PRODUCT SALES, STOCK AND PROFIT LEVELS

Unit Accreditation No: y5059722
Unit Level: 4

Guided Learning Hours: 64
Unit Credits: 8

1. Understand the factors to consider when forecasting product sales, stock and profit levels within their own area of retail operations

- 1.1. Explain the factors which can influence the accuracy of a forecast:
 - how reliably sales can be predicted for different types of product
 - how consistently suppliers and the supply chain perform
 - how far ahead they are forecasting, including in relation to forecasting within a sales 'season'
 - whether information on past performance is complete
- 1.2. Describe how frequently forecasts are carried out in their own organisation at the level of:
 - individual product lines
 - product groups, ranges or categories
- 1.3. Explain how they can use the concept of product or category life-cycle to understand the implications for the sales and profit of products over time

2. Understand how to make effective forecasts of product sales, stock and profit levels

- 2.1. Explain how to analyse information to develop accurate forecasts
- 2.2. Explain what information to use in making forecasts
- 2.3. Explain how to interpret the implications of different pieces of information, including those aspects which should be given greater importance
- 2.4. Explain why it is important to check and resolve any queries about information before using it in a forecast
- 2.5. Explain how to present forecasts so that they are clear and easy to understand
- 2.6. Identify who needs to see their forecasts
- 2.7. Identify who they should ask for qualitative judgements which may inform forecasting adjustments
- 2.8. Explain why it is important that the information provided by forecasts is:
 - relevant
 - easy to understand

3. Be able to make forecasts regarding product sales, stock and profit levels

- 3.1. Gather and interpret accurately all relevant information in making a forecast
- 3.2. Determine the views and perceptions of relevant others
- 3.3. Demonstrate that information has been checked and any anomalies resolved before using the information to make a forecast
- 3.4. Produce forecasts at the required level of detail, including those in relation to:
 - individual product lines
 - product groups, ranges or categories
- 3.5. Make clear any assumptions which they apply in making a forecast
- 3.6. Make clear what level of confidence applies to a forecast

4. Be able to present forecasts which inform decision-making

- 4.1. Produce and update forecasts at suitable intervals to support effective decision-making
- 4.2. Present forecasts clearly in a manner that can be understood

readily

4.3. Communicate forecasts promptly in line with organisational requirements

PRODUCTION PLANNING IN THE WOOD INDUSTRY

Unit Accreditation No: H5066026

Guided Learning Hours: 64

Unit Level: 4

Unit Credits: 8

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| 1. Be able to plan for production | <ul style="list-style-type: none">1.1. Produce clear production plans following company procedures and in line with requirements1.2. Carry out costing for production following company procedures1.3. Produce method statements following company procedures1.4. Keep records on production planning following company procedures1.5. Carry out risk assessments following company procedures1.6. Evaluate production processes following company procedures1.7. Produce work plans in conjunction with team members1.8. Communicate effectively with teams1.9. Review work plans with teams1.10. Give feedback to team members |
| 2. Understand how to plan for production | <ul style="list-style-type: none">2.1. Describe processes for developing production plans2.2. Describe production planning methods and their advantages and disadvantages2.3. Describe methods for procuring materials2.4. Explain costs of production2.5. Outline the records that must be kept and why2.6. Describe how to plan and organise safe working practices2.7. Explain the evaluation methods for production processes2.8. Explain the stock control methods2.9. Explain how to produce work plans in conjunction with team members2.10. Explain how to effectively communicate with team members2.11. The importance of regularly reviewing work plans with teams2.12. Outline the types of organisational constraints which influence production planning2.13. Describe how to give feedback to team members |

SOURCE REQUIRED GOODS AND SERVICES IN A RETAIL ENVIRONMENT

Unit Accreditation No: T5035671

Guided Learning Hours: 52

Unit Level: 3

Unit Credits: 10

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| 1. Understand the role of suppliers when sourcing goods and services | 1.1. Explain how suppliers' terms and conditions can affect the profitability of a retail business
1.2. Explain the organisation's legal rights as a purchaser of goods and services, including rights relating to returns, replacements and refunds
1.3. Explain what constitutes a legally binding contract between retailer and supplier |
| 2. Be able to source required goods and services | 2.1. Interpret stock records to establish: <ul style="list-style-type: none">• Which stock needs replenishing• The quantity of stock required 2.2. Evaluate the service offered by suppliers, taking account of: <ul style="list-style-type: none">• The availability of the required goods and services• The terms and conditions offered by suppliers |
| 3. Be able to order goods and services | 3.1. Analyse purchase requisitions to identify items that can be ordered together
3.2. Order goods and services: <ul style="list-style-type: none">• Of the required type and quantity• Allowing sufficient time for delivery 3.3. Develop procedures that will enable colleagues to give sufficient notice of any special orders for goods and services
3.4. Resolve overdue or incomplete orders with the supplier
3.5. Arrange returns, replacements and refunds when applicable
3.6. Explain the options available when orders cannot be fulfilled on time
3.7. Maintain purchasing records that are in line with organisational procedures |
| 4. Be able to evaluate the performance of suppliers of stock for retail sale | 4.1. Evaluate the quality, price and timeliness of deliveries against the organisation's requirements
4.2. Evaluate colleagues' feedback about suppliers' performance to determine if the standard of performance is acceptable
4.3. Provide feedback to suppliers on the level of service they provide |

ASSESSING CUSTOMERS' CREDIT STATUS

Unit Accreditation No: T5028638
Unit Level: 3

Guided Learning Hours: 52
Unit Credits: 10

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| 1. Understand how to assess customer credit status | 1.1. Explain the purpose of assessing customers' credit status
1.2. Describe a range of internal and external checks that may be used to assess customer credit status
1.3. Explain how liquidity ratios are calculated and are used to assess customer credit status
1.4. Explain the importance of following organisational procedures when carrying out a credit status assessment |
| 2. Be able to assess the credit status of customers | 2.1. Identify the customers' requirements for sales and credit
2.2. Explain to the customer the process the organisation will use for approving credit and setting a credit limit
2.3. Gather sufficient financial information from the customer to support credit searches
2.4. Ensure the customer is financially secure by analysing their liquidity ratios
2.5. Confirm the creditworthiness of customers by conducting checks through banks, credit rating agencies or supplier references and internal colleagues
2.6. Complete a formal agreement with the customer in line with the organisational procedures if the credit searches have proved satisfactory
2.7. Explain to the customer if the credit searches have proved negative and offer cash trading only |
| 3. Be able to monitor the credit status of customers | 3.1. Monitor the customer's account regularly following the organisation's procedures
3.2. Liaise with the customer regarding any changes in credit limits and the status of their account in accordance with organisational procedures |

SCHEDULE LOGISTICS OPERATIONS TO MEET CUSTOMERS REQUIREMENTS

Unit Accreditation No: K6017596
Unit Level: 3

Guided Learning Hours: 18
Unit Credits: 4

1. Know how to schedule logistics operations to meet customer requirements

- 1.1. Explain the relevant organisational policies and procedures, in relation to scheduling logistics operations to meet customer requirements, that relate to:
 - health, safety and security
 - compliance
 - roles, responsibilities, information and management systems.
- 1.2. Describe the different sources and types of information required for scheduling logistics operations to meet customer requirements.
- 1.3. Explain the importance of good communication methods.
- 1.4. Explain the methods and tools used for scheduling logistics operations to meet customer requirements.
- 1.5. Explain the factors that need to be taken into account when scheduling logistics operations to meet customer requirements.
- 1.6. Describe the activities that need to be taken into account when scheduling logistics operations to meet customer requirements.
- 1.7. Identify problems that can occur when scheduling logistics operations to meet customer requirements.
- 1.8. Explain appropriate action when dealing with identified problems.

2. Be able to schedule logistics operations to meet customer requirements

- 2.1. Follow all organisational policies and procedures, in relation to scheduling logistics operations to meet customer requirements, that relate to:
 - health, safety and security
 - compliance
 - roles, responsibilities, information and management systems.
- 2.2. Comply with logistics operations that are required to meet customers requirements.
- 2.3. Agree with customers the timings and deadlines for the provision for the logistics operations.
- 2.4. Apply scheduling methods and tools according to organisational procedures.
- 2.5. Apply logistics resources and sequence of tasks required to provide the logistics operations.
- 2.6. Review all relevant factors and risks that could affect the schedule.
- 2.7. Plan the logistics operations to ensure that the supply chain continues to function effectively.
- 2.8. Monitor the provision of logistics operations against the schedule.
- 2.9. Record work according to operational procedures.

LEADING A SALES OR MARKETING TEAM

Unit Accreditation No: T5028641
Unit Level: 3

Guided Learning Hours: 25
Unit Credits: 4

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| 1. Be able to set targets for the sales or marketing team | 1.1. Agree Specific, Measurable, Achievable, Realistic and Time-bound (SMART) targets for individuals and sales or marketing team performance
1.2. Agree personal objectives for individual members of the sales or marketing team |
| 2. Be able to support the motivation of the sales or marketing team | 2.1. Provide support to team members toward achieving targets and objectives
2.2. Give recognition to individuals' successes
2.3. Use individual rewards and incentives to maintain morale in a sales or marketing environment
2.4. Encourage team members to put forward ideas
2.5. Assist team members to overcome feelings of 'rejection' that are experienced as a result of a lack of success in sales or marketing endeavours |
| 3. Be able to monitor and evaluate the progress of the sales or marketing team | 3.1. Monitor activities and progress across the team in accordance with the sales or marketing plan
3.2. Monitor the achievements of individual and sales or marketing team targets in accordance with the sales or marketing plan
3.3. Monitor customer interaction with individual team members in accordance with the sales or marketing plan
3.4. Evaluate customer interaction with individual team members against agreed criteria
3.5. Monitor compliance with legal, regulatory and ethical requirements relating to sales or marketing team activities
3.6. Appraise the success of sales or marketing activities against agreed objectives and targets
3.7. Identify areas for improvement in sales or marketing activities |

ASSESSMENT

Assessment principles should follow recognised good practice. The qualification is made up of units from different standard setting bodies and their Assessment Strategies should be used.

All learning outcomes and assessment criteria should be met.

Simulation is not permitted.

QUALIFICATION CERTIFICATION

All learning outcomes and assessment criteria are to be achieved. Whilst there is no grading to this qualification (pass, credit, etc.), the training delivery and feedback should promote the notion of continued improvement and craftsmanship.

GLOSSARY

Term	Definition
Learning Outcome	This describes what a learner needs to know, understand or do as a result of the process of learning.
Assessment Criteria	These are the requirements learners are expected to meet to demonstrate that a learning outcome has been achieved.
Centre	The organisation that is approved by PIABC for the purposes of preparing learners for assessment.

SUGGESTED SOURCE MATERIAL

A comprehensive list of source materials and references that may be used to support learning for qualification is available from the PIABC web site (www.piabc.org.uk).