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**GOVERNMENT NOTICE**

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**SOUTH AFRICAN QUALIFICATIONS AUTHORITY**

No. 909

15 September 2005

Established in terms of Act 58 of 1995**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

**Wholesale and Retail**

Registered by Organising Field 11, Services, publishes the **following** qualification and unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the qualification and unit standards upon which qualification is based. The qualification unit standards can be accessed via the SAQA web-site at [www.saga.org.za](http://www.saga.org.za). Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, Hatfield Forum, 1067 Arcadia Street, Hatfield.

Comment on the unit standards should reach SAQA at the address **below and no later than 14 October 2005**. All correspondence should be marked **Standards Setting – SGB for Wholesale and Retail** and addressed to

The Deputy Director: Standards Setting  
SAQA

Attention: Mr. E. Brown

Postnet Suite 248

Private Bag X06

Waterkloof

0145

or faxed to 012 – 431 5144

e-mail: [ebronw@saqa.co.za](mailto:ebronw@saqa.co.za)



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DUGMORE MPHUTHING

ACTING DIRECTOR: STANDARDS SETTING AND DEVELOPMENT



## SOUTH AFRICAN QUALIFICATIONS AUTHORITY

### QUALIFICATION:

#### *National Certificate: Wholesale and Retail: Help Desk Procedures*

SAQA QUAL ID	QUALIFICATION TITLE		
49997	National Certificate: Wholesale and Retail: Help Desk Procedures		
SGB NAME	NSB 11	PROVIDER NAME	
SGB Retail and Wholesale	Services		
QUAL TYPE	FIELD	SUBFIELD	
National Certificate	Services	Wholesale and Retail	
ABET BAND	MINIMUM CREDITS	NQF LEVEL	QUALIFICATION CLASS
Undefined	120	Level 2	Regular-Unit Stds Based

#### **PURPOSE AND RATIONALE OF THE QUALIFICATION**

##### **Purpose:**

The purpose of this qualification is to equip learners to understand and acquaint themselves with the underlying principles of all of the major areas related to Call Centre Sales within the Wholesale and Retail sector, thus enabling them to become more effective employees. The Certificate forms part of the learning and career paths in the Wholesale and Retail environment thus promoting the notion of quality lifelong learning. By assisting in the development of competence in the Wholesale and Retail field (arguably one of the bigger, more labour intensive and therefore important arenas for social and economic transformation in the country), this Certificate will help to improve service delivery in the sector.

This Certificate provides learners with grounding in all areas of Wholesale and Retail. This will enable them not only increase their productivity within the Call Centre Retail field, but also within the greater Wholesale and Retail Sector. In addition it will also enable them to apply their learning in various other business environments.

##### **Rationale:**

The Certificate in Wholesale and Retail Help Desk Procedures, NQF Level 2, is designed to meet the needs of the learners who are already employed and involved in Mail Order Retail within the Wholesale and Retail field. Additionally, however, it will also allow access to, and meet the needs and aspirations of the youth and unemployed who wish to pursue a career in these areas, or in fields where this learning may be useful. This furthermore includes adult learners who want to enter the arena or develop their careers in one or more of the related sub-fields. As this Certificate will form part of a learning pathway it will allow mobility to persons operating at any level in the field.

This qualification reflects some of the needs of the Wholesale and Retail sector both now and in the future as it developed following much discussion with Mail Order House and other organisations involved in Call Centre Sales. During the discussions it became clear that there were no Qualifications available for these stakeholders and as a result, based on specific needs expressed, the Certificate in Wholesale and Retail Help Desk Procedures was developed. The impact of this Certificate on society and the economy is reflected in the multiple job roles and careers opportunities that can stem from the qualification.

The added value of the skills, knowledge and understanding developed by the Certificate will be evidenced by greater productivity resulting from the improved performance by the learner, due to the integration of the learning which will have taken place in the workplace.

#### **RECOGNIZE PREVIOUS LEARNING?**

Y

**LEARNING ASSUMED TO BE IN PLACE**

Learners starting to access this qualification will have demonstrated competence against the relevant Mathematical Literacy and Communication standards at NQF Level 1, either through a previous qualification, or through the process of Recognition of Prior Learning, which assesses workplace-based experiential learning.

Recognition of prior learning:

This Qualification can be achieved wholly or in part through the Recognition of Prior Learning. The Qualification may be granted to learners who have acquired the skills and knowledge without attending formal courses providing they can demonstrate competence in the outcomes of the individual Unit Standards as required by the Fundamental, Core and Elective areas stipulated in the Qualification and by the Exit Level Outcomes of the qualification.

An RPL process may also be used to credit learners with Unit Standards in which they have developed the necessary competency as a result of workplace and experiential learning.

RPL may also be used by learners, who are not in possession of a GETC or equivalent qualification, to gain access to the Qualification.

Learners submitting themselves for RPL should be thoroughly briefed prior to the assessment, and will be required to submit a Portfolio of Evidence in the prescribed format to be assessed for formal recognition. While this is primarily a workplace-based Qualification, evidence from other areas of endeavour may be introduced if pertinent to any of the exit level outcomes.

Access to the qualification:

There is open access to any learner who is employed in the Wholesale and Retail sector, or who is able to arrange for assessment of the Wholesale and Retail sector specific Unit Standards and Exit Level Outcomes to be assessed in a Wholesale and Retail sector work environment.

**QUALIFICATION RULES**

The Certificate is made up of a planned combination of learning outcomes that have a defined purpose and will provide qualifying learners with applied competence and a foundation for further learning.

The Qualification is made up of Unit Standards classified as Fundamental, Core and Elective. A minimum of 120 credits is required to complete the Qualification.

In this Qualification the credits are allocated as follows:

- > All Fundamental Unit Standard totalling 36 credits are compulsory.
- > All Core Unit Standard totalling 32 credits are compulsory.
- > Learners are to select Elective Unit Standards totalling 52 credits to complete the qualification. Learners may choose these electives from those provided in the qualification or the learners can choose any registered Unit Standard that is applicable to the learning required and that is approved by the appropriate ETQA as an elective within the this Qualification.

**EXIT LEVEL OUTCOMES**

Qualifying learners will be able to:

1. Communicate verbally and in writing.
2. Understand and apply mathematics.
3. Identify and apply the fundamental components of the Wholesale and Retail environment.
4. Handle in and out bound help desk/call centre calls in a commercial environment.
5. Demonstrate an understanding of and perform general Wholesale and Retail functions.
6. Perform general administrative, office and self development functions.

**ASSOCIATED ASSESSMENT CRITERIA**

1:

- > Texts are read and responded to.
- > Main ideas in texts are identified and interpreted.
- > A variety of speaking and listening strategies, accommodating socio-cultural sensitivities, are used to maintain communication.
- > Information is organised and presented in a focused and coherent manner.
- > A specific audience and purpose is written for by adapting language to suit the context.

2:

- > Basic calculations are made using a range of techniques and electronic equipment.
- > The legal requirements associated with Wholesale and Retail calculations are recognized and complied with as required.
- > Problems are solved by using a range of patterns and mathematical functions.

3:

- > The Wholesale and Retail business environment is understood in terms of the services it provides.
- > The relationship between various categories and sub-sectors within the Wholesale and Retail environment is identified and explained with examples.
- > The relationship between various operational departments in a Wholesale and Retail store is identified and explained with examples.
- > The concept of "target market" is understood and the target market for a specific business is explained.
- > Stock flow is related to sales and cash flow so that an optimal level of stock is maintained to meet customers' demands.

4:

- > In-coming calls are handled using organisational systems, policies, procedures and standards.
- > Calls are categorized according to the policies and procedures of the organisation.
- > Customer queries are responded to and recorded within required timeframes and organisational policy.
- > Out-bound calls are planned according to the circumstances and the requirements of the organisation.
- > Calls are made, conducted and closed according to organisational requirements.
- > The information is verified to be correct with the customer and is recorded according to the policies and procedures of the organisation.

5:

- > Legislation regarding Occupational Health and Safety is understood and applicable safety procedures are applied and adhered to in a workplace.
- > Appropriate action is taken with regard to hazards and emergency situations.
- > Internal and external housekeeping standards are maintained at all times.
- > Steps for dealing with customer complaints/queries are explained in line with organisational procedures.
- > Customer's query/complaint is interpreted and appropriate actions are suggested as per organisational procedures.
- > Appropriate resources to solve the customer's complaint are identified where necessary.
- > Agreed actions are implemented to the satisfaction of the customer and the organisation.
- > Products are offered and sold to customers using appropriate techniques.

6:

- > General office administration related to the organization is performed according to organization requirements.
- > The office area is maintained according to organisational standards.
- > Knowledge of how to behave in a business environment and an understanding of basic business ethics is demonstrated at all times.
- > Different types of expenses are identified and explained as they apply to a wholesale or retail outlet.
- > The causes of increases/decreases in store expenses are explained as applicable to an outlet.
- > General methods for calculating and reducing shrinkage are explained as they apply to the industry.

Integrated assessment:

Integrated assessment at this level will evaluate the learner's ability to combine actions and ideas across a range of activities and knowledge areas. The integrated assessment must specifically assess the learner's ability to:

- > Demonstrate competence by means of the practical application of the embedded knowledge in a manner

that meets the required performance standards required.

> Illustrate a clear understanding of the concepts, theory and principles that underpin the practical action taken.

The assessment will require assessment methods, which take evidence generated during on-the job activities into account. Because assessment practices must be open, transparent, fair, valid and reliable; ensuring that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

A variety of methods must be used in assessment and tools and activities must be appropriate to the context in which the learner is working or will work. Where it is not possible to assess the learner in the workplace, simulations, case studies, role-plays and other similar techniques should be used to provide a context appropriate to the assessment.

The term integrated assessment implies that theoretical and practical components should be assessed together. Whenever possible the assessment of knowledge, skills, attitudes and values shown in the Unit Standards should be integrated and, during integrated assessment, the assessor should make use of a range of formative and summative assessment tools and methods. Combinations of practical, applied, and foundational competencies should be assessed. Assessment should further ensure that all specific outcomes, embedded knowledge and critical cross-field outcomes are evaluated in an integrated way.

Assessors must assess and give credit for the evidence of learning that has already been acquired through formal, informal and non-formal learning and work experience as the assessment process is capable of being applied to RPL, subject to the rules and criteria of the relevant ETQA.

#### **INTERNATIONAL COMPARABILITY**

The following list of qualifications broadly relate to the National Certificate: Wholesale and Retail: Help Desk Procedures:

- > National Certificate in Call Centre Operations (NC 0643) - New Zealand.
- > Scottish Vocational Qualification in Call Handling Operations (G5VA) - Scotland.
- > Certificate II in Telecommunications (Call Centres) (ICT 20499) - Australia.

In addition the Qualification relates to the following courses offered by independent providers:

- > Call Centre Operations Course offered by the Nottinghamshire County Council ([www.nottinghamshire.gov.uk](http://www.nottinghamshire.gov.uk)).
- > Call Centre Training offered by Janine Lazarus Media Consultancy ([www.biz-community.com](http://www.biz-community.com)).
- > The following courses offered in India by BK One Centre for Excellence in Training ([www.bkone.co.in](http://www.bkone.co.in)).
- > Customer service training.
- > Customer relationship training.
- > Marketing and Sales training.

In addition to the above the international Unit Standards as listed below translate directly to the newly developed Unit Standards as included in this Qualification. The key for the table is as follows:

- > NZ - New Zealand ([www.nzqa.govt.nz](http://www.nzqa.govt.nz)).
- > AUS - Australia ([www.ntis.gov.au](http://www.ntis.gov.au)).
- > Handle in bound help desk calls:
  - > Assist customers with account enquiries in a call centre (NZ 16779).
  - > Receive and resolve customer complaints about products and services in a call centre (NZ 16784).
  - > Use telecommunications technology in receiving and making calls in the call centre environment (AUS ICTTC200A).
  - > Respond to inbound calls relating to a specific marketing campaign (AUS ICTTC206A).
- > Handle out bound help desk calls:
  - > Use telecommunications technology in receiving and making calls in the call centre environment (AUS ICTTC200A).
  - > Conducting telemarketing campaign involving selling of product/service (AUS ICTTC208A).
- > Plan self development:
  - > Determine the adult training and development requirements for a group (NZ5235).
  - > Manage personal work priorities and professional development (AUS ICTTC227A).

- > Complete basic business calculations:
  - > Use calculations in money situations (NZ 5234).
  - > Perform business calculations in a retail or business environment (NZ 407).
  - > Perform calculations for the workplace (NZ 64).

### **ARTICULATION OPTIONS**

This Qualification will articulate vertically with all other qualifications registered within the envisioned learning pathway (currently NQF Levels 2-5). Possibilities for vertical articulation outside of the Wholesale and Retail environment include (for example):

- > Certificate: Basic Administration (ID 20356).
- > Certificate: Retailing (ID 22956).
- > National Certificate: Contact Centre Support (ID 21793).

Possibilities for horizontal articulation outside of the Wholesale and Retail environment include (for example):

- > Certificate: Accommodation Operations and Services (ID 22915).
- > Certificate: Reception Operations and Services (ID 22914).

### **MODERATION OPTIONS**

- > Anyone assessing a learner, or moderating the assessment of a learner, against this Qualification must be registered as an assessor with the relevant ETQA, or with an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- > Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the relevant ETQA, or with an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- > Assessment and moderation of **assessment** will be **overseen** by the relevant ETQA according to the policies and guidelines for assessment and moderation of that ETQA, in terms of agreements reached around assessment and moderation between various ETQA's (including professional bodies), and in terms of the moderation guideline detailed immediately below.
- > Moderation must include both internal and external moderation of assessments at all exit points of the Qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual Unit Standards as well as the integrated competence described in the Exit Level Outcomes of the Qualification.
- > Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the relevant ETQA, or with an ETQA that has a Memorandum of Understanding with the relevant ETQA.

The options as listed above provide the opportunity to ensure that assessment and moderation can be transparent, affordable, valid, reliable and non-discriminatory.

For an applicant to register as an assessor or moderator of this Qualification the applicant needs:

- > To be registered as an assessor with the relevant ETQA.
- > To be in possession of a relevant Qualification (higher than NQF Level 2).

### **CRITERIA FOR THE REGISTRATION OF ASSESSORS**

N/A

### **NOTES**

N/A



**UNIT STANDARDS****(Note: A blank space after this line means that the qualification is not based on Unit Standards.)**

	<b>UNIT STANDARD ID AND TITLE</b>	<b>LEVEL</b>	<b>CREDITS</b>	<b>STATUS</b>
Core	114895 Define the core concepts of the wholesale and retail environment	Level 2	10	Registered
Core	114902 Operate a computer in a Wholesale/Retail outlet	Level 2	6	Registered
Core	120190 Handle in-bound help desk calls	Level 2	8	Draft - Prep for P Comment
Core	120191 Handle out-bound help desk calls	Level 2	8	Draft - Prep for P Comment
Elective	14342 Manage time and work processes within a business environment	Level 2	4	Registered
Elective	14359 Behave in a professional manner in a business environment	Level 2	5	Registered
Elective	114889 Record transactions	Level 2	8	Registered
Elective	114890 Perform office functions in a wholesale and retail outlet	Level 2	4	Registered
Elective	114894 Process payment at a Point of Sales (POS)	Level 2	10	Registered
Elective	114897 Administer deliveries	Level 2	10	Registered
Elective	114899 Maintain the customer's account	Level 2	5	Registered
Elective	114912 Maintain a safe and secure wholesale and retail environment	Level 2	10	Registered
Elective	114919 Offer a credit facility	Level 2	8	Registered
Elective	117887 Complete basic business calculations	Level 2	5	Registered
Elective	114898 Minimise defaulting customer accounts	Level 3	5	Registered
Elective	114900 Sell products to customers in a Wholesale and Retail outlet	Level 3	12	Registered
Elective	114905 Administer day-end cashing up procedures	Level 3	8	Registered
Elective	114909 Administer and control the organisation's deposits and floats	Level 3	8	Registered
Elective	114911 Resolve customer queries / complaints	Level 3	8	Registered
Fundamental	7469 Use mathematics to investigate and monitor the financial aspects of personal and community life	Level 2	2	Reregistered
Fundamental	7480 Demonstrate understanding of rational and irrational numbers and number systems	Level 2	3	Reregistered
Fundamental	8962 Maintain and adapt oral communication	Level 2	5	Reregistered
Fundamental	8963 Access and use information from texts	Level 2	5	Reregistered
Fundamental	8964 Write for a defined context	Level 2	5	Reregistered
Fundamental	8967 Use language and communication in occupational learning programmes	Level 2	5	Reregistered
Fundamental	9007 Work with a range of patterns and functions and solve problems	Level 2	5	Reregistered
Fundamental	9008 Identify, describe, compare, classify, explore shape and motion in 2-and 3-dimensional shapes in different contexts	Level 2	3	Reregistered
Fundamental	9009 Apply basic knowledge of statistics and probability to influence the use of data and procedures in order to investigate life related problems	Level 2	3	Reregistered



## SOUTH AFRICAN QUALIFICATIONS AUTHORITY

### UNIT STANDARD:

1

#### Handle in-bound help desk calls

SAQA US ID	UNIT STANDARD TITLE		
120190	Handle in-bound help desk calls		
SGB NAME	NSB 11	PROVIDER NAME	
SGB Retail and Wholesale	Services		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Services	Wholesale and Retail	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	8	Level 2	Regular

#### **SPECIFIC OUTCOME 1**

Explain the use of organisational systems.

#### **SPECIFIC OUTCOME 2**

Answer and categorise in-coming calls.

#### **SPECIFIC OUTCOME 3**

Respond to calls.



## SOUTH AFRICAN QUALIFICATIONS AUTHORITY

## UNIT STANDARD:

2

## Handle out-bound help desk calls

SAQA US ID	UNIT STANDARD TITLE		
120191	Handle out-bound help desk calls		
SGB NAME	NSB 11	PROVIDER NAME	
SGB Retail and Wholesale	Services		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Services	Wholesale and Retail	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	8	Level 2	Regular

**SPECIFIC OUTCOME 1**

Plan the call.

**SPECIFIC OUTCOME 2**

Place calls to customers.

**SPECIFIC OUTCOME 3**

Record information.

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Entrance in Andries Street

## **Contact details**

Tel: (012) 321-8931  
Fax: (012) 325-5984  
E-mail: [infodesk@nlsa.ac.za](mailto:infodesk@nlsa.ac.za)