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Ministry of Labor and Skills

Fruit and Vegetable Processing Level I



Based on September 2021, Version 3 Occupational Standards (OS)

Module Title: Performing Stock Control Procedures

LG Code: IND FVP1 M07 LO (1-4) LG (23-26)

TTLM Code: IND FVP1 TTLM 0123v1

January, 2023

Addis Ababa, Ethiopia

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Ministry of Labor and Skills

Table of Contents

Introduction to the module 2

LO #1-Receive and process incoming good 3

Instruction sheet 3
Information Sheet 1 4
Self-check 1 38

LO #2- Rotate stock 45
Instruction sheet 45
Self-Check 2 68
Operation Sheet- 2 71
Lap Test 2 74

LO#3- Assess quality of service delivered 75
Instruction sheet 75
Information Sheet 3 76
Self-Check – 3 95

LO #4-Receive and process incoming goods 98
Instruction Sheet 98
Information Sheet 4 99
Self-check 4 107

Reference 108

Introduction to the module

This module covers to provide the trainees with the skills and knowledge required to receive and process incoming goods, rotate stock, assess quality of service delivered and record information and complete documentation.

Stock control is a term for any and all procedures involved in monitoring and managing the amount of stock in your business at any given time. Stock control, also known as inventory control, is the process of maintaining the appropriate quantity of stock, so a business can meet customer demand without delay while keeping the costs of holding stock to a minimum.For almost all businesses which use stock, stock is their single largest investment. This makes efficient stock control vital to your company's success.

Developing your stock control procedures involves three basic actions of determining stock level policy, implementing inventory control and cross-checking inventory control

LG #23	LO #1-Receive and process incoming good

Instruction sheet

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Introduction to the module
- Receive and process incoming goods.
- Rotate stock
- Assess quality of service delivered
- Record information and complete documentation

This guide will also assist you to attain the learning outcomes stated in the cover page. Specifically, upon completion of this learning guide, you will be able to:

- Receive and process incoming goods.
- Rotate stock
- Assess quality of service delivered
- Record information and complete documentation

Learning Instructions:

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below.
3. Read the information written in the information Sheets
4. Accomplish the Self-checks
5. Perform Operation Sheets
6. Do the “LAP test”

Information Sheet 1

1.1 Store policy and procedures

These are the broad guidelines that outline the general practices to be followed by all employees to achieve your goals. Take time to think these various details through, then schedule times for each task to be done and who is to do it. Policies are more than daily procedures and work rules; they're a road map for success.

When done well, such policies help customers to feel more confident buying from you, and give you a place to point customers to whenever questions arise. In this way, store policies can help protect your company from disputes by eliminating unnecessary friction.

Policies set some parameters for decision-making but leave room for flexibility. They show the "why" behind an action.

Procedures, on the other hand, explain the "how." They provide step-by-step instructions for specific routine tasks.

Store policy and procedure provides a general framework for the fiscal operations of stores. It has the following significance:

- To keep purchases at low level
- To avoid delays in procedures
- To keep stock at minimum
- To not to go out of stock for any item
- Permission for local purchases
- Indents to be obtained for all purchases
- All issues are to be acknowledged by recipients
- Scraps are to be handed over at stores under acknowledgement
- Physical Stock is to be taken at year end
- All transactions are to be accounted
- Stock is to be verified on perpetual basis

- The purchase and stock activities are to be done by the store keeper himself.



Figure 1.1: Policies and procedure

❖ Storing all stock as soon as possible after delivery to:

- Guard against theft
- Remove potential tripping hazards
- Keep the area clear for future deliveries
- Refrigerate items requiring refrigeration

1.1.1 Storage of fruits and vegetables

Year-long supplies of fresh food have been made possible by improvements in controlled storage conditions, shipping and importing. A fresh weekly food supply at the local supermarket has eliminated the need for the home preservation and food processing of earlier days. Today, we may choose to preserve and process food for reasons besides availability such as the price of food, quality and nutrition. For these reasons, gardeners who find themselves with a surplus of

fresh produce at the end of the season may decide to store and preserve. There are five methods of storing vegetables and fruit: drying, canning, curing and salting, freezing and common storage. Which method is chosen depends upon the type of produce, the quality desired and the facilities available for storage.

Regardless of the method chosen, some general rules should be followed:

1. Use only fresh produce.
2. Begin the preservation process immediately after harvest.
3. Avoid damaged, cut, bruised and pest or disease infested produce.
4. Use all preserved produce within one year of storage.

a) Common storage

The method used to preserve most of the produce generated by our ancestors is referred to as common storage. This involves storing harvested produce in a darkened, cold area. There are various ways where this can be done including leaving the produce in the ground, burying it in the ground in pits, storing in cellars or basements and storing in wooden crates or barrels located in cool areas like a garage or porch.

A Clean storage space: Always keep the storage area clean of debris and discard fruits and vegetables as soon as they begin to show signs of decay. Containers should be removed during the summer, washed and dried in the sun.

Monitor the temperature: Monitor temperatures to avoid produce being destroyed by any exposure to low or high temperatures, which can happen in extreme cases. Thermometers should be placed inside and outside the storage facility. Stored produce will give off heat during storage making it necessary to regulate temperatures by use of the ventilation windows. If the outside temperature is 25 degrees and the inside is 32 degrees with the ventilation windows closed, the temperature will begin to rise and windows should be opened to lower the temperatures. Close the ventilation windows when outside temperatures are above the desired storage temperatures. Because certain crops are more sensitive to low temperature injury, learn their freezing point. Most fall within a range of 29 to 31 degrees.

Regulate the humidity: Over time, vegetables and fruit will give up moisture and shrivel. Maintain proper moisture levels during storage by regulating humidity. This can be done by

increasing the water in the air through humidifying or by using plastic bags and box liners for storage in individual crops. Humidification is simply taken care of by sprinkling water inside the storage area, but not directly on the produce. For root crops which lose moisture regardless of attempts to humidify with free water, placing them in plastic bags is perhaps the best way to keep them fresh. Plastic liners and bags should be ventilated by creating holes. Produce should never be sealed shut.

Handling fruit and vegetables: Handle all produce with care to avoid wounds which become good sites for storage diseases. Pick all produce dry or let dry before storage. Pack produce in plastic or wooden baskets or boxes. Move the produce to the storage area when the field heat has been reduced. Harvesting in the early morning or cooling overnight outdoors will help.

b) Selected crops & storage requirements

More vegetables than fruit can be stored; typically, they should not be mixed. When apples or pears are stored with certain vegetables, including onions or potatoes, they will adsorb odors given off by the vegetables. It, therefore, is best to store separately.

Vegetables: Certain vegetables will differ in their temperature, humidity and ventilation requirements for storage resulting in optimum quality and reduced incidence of disease or decay.

Fruits: If large quantities of fruit are stored, special storage facilities need to be provided since there is much more at stake. Most homes are not equipped for proper apple storage. Gardeners and homeowners should consider storing only small quantities of fruit for any length of time. Overall, fruit keeps best when moved to an area that is about 32 degrees. Refrigerators are typically warmer than this so the storage period is shorter.



Figure 1.2: Fruit and vegetable cooling chamber storage

Table 1.1: Storage requirements for common vegetables and fruit

Produce	Temperature (degrees F)	Relative Humidity	Avg. Storage Life
Apples	32	90-95%	4-6 months
Beets	32	95%	1-3 months
Brussels Sprouts	32	90-95%	3-5 weeks
Cabbage	32	90-95%	3-4 months
Carrots	32	90-95%	4-6 months
Cauliflower	32	90-95%	2-4 weeks
Celeriac	32	90-95%	3-4 months
Chinese Cabbage	32	90-95%	1-2 months
Dry Beans	32-50	65-70%	1 year
Garlic	32	65-70%	6-7 months
Horseradish	30-32	90-95%	10-12 months
Kale	32	90-95%	10-14 days
Kohlrabi	32	90-95%	2-4 weeks
Leeks	32	90-95%	1-3 months
Onions	32	65-70%	5-8 months
Parsnips	32	90-95%	2-6 months
Pears	32	90-95%	1-2 months
Sweet Peppers	45-50	90-95%	8-10 days
Potatoes	38-40	90%	5-8 months
Pumpkins	50-55	70-75%	2-3 months
Rutabaga	32	90-95%	2-4 months
Salsify	32	90-95%	2-4 months
Sweet Potato	55-60	85-90%	4-6 months
Tomatoes (green)	55-60	85-90%	2-6 weeks
Turnips	32	90-95%	4-5 months

1.1.2 Product storage

The purpose of this procedure is to ensure that stored product and materials are not damaged or altered prior to use or delivery. Storage procedures apply to product and material from initial receipt until final shipping and delivery. Only designated storage areas shall be identified and used to prevent damage or deterioration of the product pending use or delivery.

Applies to product and materials while on company property during manufacturing, warehousing and shipping. Responsible Manager and/or Environmental Health and Safety Manager is responsible for:

- Determining special storage requirements
- Creating reference procedures

- Controlling access to secure storage areas

Handler is responsible for implementing standard and special storage procedures

Definitions

Handler means the person who arranges product for delivery or receives, manufactures, moves, stores or packages the product.

Responsible Manager means the individual directly responsible for ensuring a high-quality organization by complying with policies or procedures.

Procedure of general storage

1. Standard warehousing storage conditions shall be considered acceptable unless special storage is required.
2. Storage through manufacturing and warehousing shall:
   - Preserve lot integrity
   - Prevent mix-ups
   - Protect from damage and/or deterioration
   - Prevent contamination or other adverse effects
   - Prevent unauthorised release
3. Inventory shall be kept in a secure location that is locked when not in use.
4. For product that deteriorates over time, the product shall be stored to facilitate proper stock rotation. Expiry dates for product shall be clearly marked. In addition, the condition of the product in stock shall be assessed at appropriate intervals.
5. Where possible, labelling in storage areas shall identify the contents and any relevant physical characteristics (e.g., expiry date, temperature limits).
6. If storage areas other than designated areas (warehouse, laboratory and manufacturing area) are used, the Responsible Manager shall designate these areas and specify any limitations and/or restrictions on storage.
7. Access to the storage and/or stock room shall be restricted as noted. [Add any affected job descriptions and/or security clearances].

8. If a problem is identified during the manufacturing process, any affected parts shall be identified and segregated in accordance with what we do with Defective Product.
9. Special storage procedures shall be used as determined by the responsible manager.
10. Special storage procedures shall be prepared and implemented for storing materials that are biological, radioactive, explosive, flammable, highly pressurised, corrosive or reactive.
11. Proper training shall be implemented, as required, when following special storage procedures, to ensure a safe level of storage.
12. Special handling and storage may be required for temperature-sensitive materials and product. Heat-sensitive items under temperature control shall be monitored as required.



Figure 1.2: Cold room product storage

1.2 Maintaining cleanliness and orderliness in receiving

The general requirements commonly applied industry-wide in order to maintain a stock area are keeping the stores area clean and tidy at all times by removing waste. This means physically removing empty boxes, cartons, crates and dividers from which stock has been taken. Packaging

and wrapping materials used to protect and wrap items unloaded on to shelves and/or into containers. Cleaning the area in line with venue requirements such as in accordance with the cleaning schedule for the area. This may include:

- Sweeping
- Mopping
- Using a pressure washer

Identifying and removing unsafe, unusable or unsalable items from the storage areas such as:

- Damaged items
- Food that has exceeded its use-by date
- Food contaminated by vermin
- Cleaning up spills as they occur
- Implementing cleaning schedules for the area
- Removing wrapping, packaging and waste
- Cleaning and tidying as part of other store room activities as opposed to making „cleaning and tidying" a separate task.

Protect against damage that can occur to items left lying around in the delivery area caused by other deliveries being made or general staff traffic in the immediate area. This include:

- Keeping stores area well-lit and ventilated to deter pests and allow for easy identification of stock items and problem issues.
- Keeping shelves, benches, pallets, bins and other storage containers in good order and inspecting the area/fixtures and fittings on a regular basis for signs of damage or deterioration or other problems such as stability, security and pest infestation
- Maintaining all equipment and storage areas in accordance with the relevant occupational health and safety requirements and (for beverage storage and food related items such as single-use items and food packaging) the requirements of food safety protocols for the property.
- Conducting preventative maintenance checks on floors, walls, lighting, storage areas and containers and fixtures within the stores areas
- Checking the temperature of refrigerated and frozen food storage areas.

- Initiating preventative maintenance servicing for plant and equipment in the stores area as opposed to waiting until items break down before servicing them.
- Restricting access to the stores area as required by the organization. This can involve prohibiting staff access to the stores areas, or limiting access to nominated staff only at designated times
- Control Dust: Dust accumulation can cause major issues for a facility, including poor air quality, fire and explosion hazards, and malfunctioning equipment. Regular surface cleaning will help reduce these risks. If your facility produces a lot of dust, an industrial vacuum is the safest and most effective way to manage dust removal. You also should have your air ventilation system cleaned and checked regularly (at least annually.



Figure 1.3: Maintaining cleanness and sorting of fruit and vegetable

1.3 Delivering Services

Service delivery is a business framework that supplies services from a provider to a client. It also includes the constant interaction between the two parties during the duration of the time in which the provider supplies the service and the customer purchases it. Essentially, a service delivery company provides something to a customer they can't create on their own. That service could be

anything from a task to technology or information. It can fall into two broad categories of general reference for any service or more industry-specific models for technical service.

Service delivery simply refers to the delivery of a service from a business to a customer. The service a business provides is something that the customer is unable to perform themselves, so there are a lot of elements to good service delivery. It encompasses all aspects of providing a service to a customer, including the initial interaction, onboarding, set up, conclusion of the service and follow-up provisions.



Figure 1.4: Delivering service of fruit and vegetable

1.3.1 Components of service delivery

Focusing on these elements can give a broader understanding of the scope of service delivery:

a. Service culture

Service culture relates to the leadership principles, vision, mission, work habits and values of a service provider company. Management controls these items, which set a basis for operations throughout the entire organization. Maintenance and development of these elements can develop the social processes of an organization and help serve the long-term success of the company.

b. Employee engagement

Employee engagement focuses on those who work within an organization to provide service delivery. Human resources and other leadership supervisors can use their influence to shape employee attitudes, activities and purposes that align with the service culture of the organization. This serves as the link between the service delivery design process and the excellence model that the customer experiences.

c. Service quality

Service quality includes all strategies, performance management systems and processes involved in service delivery. These items help define the management model that helps the client reach their end goal within the service delivery process. This element is the foundation of the service provider and client partnership.

d. Customer service

Customer service focuses on providing the client with both the resources and knowledge they desire about their service delivery product. It includes items like account management, customer intelligence and continuous improvement. This phase uses a continuous review and collaboration process to understand how customers perceive the organization's service delivery and what you can do to make it better. This can work most effectively when the customer is part of the creation and delivery process.



Figure 1.5: Delivering fruits and vegetables to customer

(https://www.youtube.com/watch?v=oue_3HZ2mas, Access date: 25/01/2023)

Service delivery focuses more on the quality of the service, ensuring the customer gets what they signed up for and what they need. Service delivery entails making sure customers are happy.

Businesses can hire companies to provide various services, which allows them to expand their operations, hand over unwanted tasks and focus on doing the things they're good at. Companies can hire a service delivery company for ongoing services, take out a short-term contract or hire one for a single, specialized task.

All service organization face choices concerning the types of products to offer and the operational procedures to use in creating them. Figure 1 shows the key steps involved in planning, creating, and delivering services. The task begins at the corporate level with a statement of institution objectives and an appraisal of current or obtainable resources. From market and competitive analysis, marketing opportunities can be identified. Positioning statement can be developed for each service that the firm plans to offer to one or more specific market segments, indicating the characteristics that distinguish it from the competition in meaningful ways.

1.3.1 Service Quality

Service quality is a measure of how an organization delivers its services compared to the expectations of its customers. Customers purchase services as a response to specific needs. They either consciously or unconsciously have certain standards and expectations for how a company's

delivery of services fulfills those needs. A company with high service quality offers services that match or exceed its customers' expectations. The five dimensions of service quality are:

a. Reliability

This refers to an organization's ability and consistency in performing a certain service in a way that satisfies its customers' needs. This process involves every step of customer interaction, including the delivery or execution of the good or service, swift and precise problem resolution and competitive pricing. Customers have a certain expectation of reliability in buying a specific product, and a company's success usually depends on its ability to meet those expectations.

b. **Tangibility**

This is an organization's ability to portray service quality to its customers. There are many factors that give a company highly tangible quality, such as the appearance of its headquarters, its employees' attire and demeanor, its marketing materials and its customer service department.

c. Empathy

Empathy is how an organization delivers its services in a way that makes the company seem empathetic to its customers' desires and demands. A customer who believes a company truly cares about their well-being is likely to be more loyal to that company.

d. Responsiveness

This is a company's dedication and ability to provide customers with prompt services. Responsiveness implies receiving, assessing and swiftly replying to customer requests, feedback, questions and issues. A company with high service quality always responds to customer communication as soon as possible which can often indicate the value a company places on customer satisfaction.

e. Assurance

Assurance is the confidence and trust that customers have in a certain organization. This is especially important with services that a customer might perceive as being above their ability to understand and properly evaluate, meaning that there has to be a certain element of trust in the servicing organization's ability to deliver. Company employees need to be mindful of earning the trust of their customers if they want to retain them.

1.3.2 Important service delivery

Service delivery is important because it helps provide people with amenities they want or need by linking them to an organization with the resources to provide those services. Companies can tailor service delivery to meet the specific needs of their customers through function or price. Engaging in thoughtful, customer-focused service delivery may also help distinguish an organization from its competitors by providing higher quality service.

When it comes to supplying services as a business, three benefits are often cited in making comparisons with returns from manufacturing. By their very nature, services usually are considerably more profitable than running plants and turning out products. Here the efficiency of human capital plays a significant role.

A second advantage is that services properly structured mainly avoid the destructive business cycles that have plagued many product manufacturers in the course of the recent recession. This is especially so for services that offer customers, whether for consumable products like most foods or for capital equipment like processing machinery, assurances on maintenance and continuing operations. No wonder then that it is producers of capital equipment, including a few of the leaders in machinery used to make food ingredients and products, that have shown the way in providing services that now represent as much as half of company revenues and in some cases a considerably larger share of profits.

The third benefit, which seems particularly appropriate for food manufacturers as well as suppliers to the industry, is how services solidify ties with customers. This explains why a few progressive companies seeking to build their business in food manufacturing have put the same or even more emphasis on services than on products or equipment. By recognizing problems their customers face, such as in how best to respond to fast-moving ingredient markets, these companies seek to build relationships that may be more enduring than those reliant on quality products alone.

The range of possibilities for valuable services both to and by food manufacturers is vast. It ranges from help for companies seeking to become more energy efficient and environmentally friendly to improved maintenance of computer-controlled equipment. It includes help with

training people who will have responsibility for operating new equipment or using new ingredients. Showing companies the endless possibilities of modernization looms high on many agendas emerging from the recent recession. Perhaps the time will come when the success of a business is gauged not just by its ability to produce excellent products at minimal costs, but also by the way it has built relationships and expanded its revenue base by offering exciting new services. Numerous opportunities exist for doing this at the supplier level. Equally great opportunities are open to food product manufacturers in offering help to both food service and food retailers. It's hard to imagine any sort of limits to what the food industry should be able to offer in the way of services as well as in products.

The main reasons why high service quality is important to an organization are:

It boosts sales: Customers that perceive a company's services as being high quality are more likely to do business with that company. Also, customers who buy from companies with high service quality are more likely to continue buying from those companies regularly.

It saves marketing money: Retaining existing customers by offering them high-quality services is typically less expensive than attracting new ones.

It can attract quality employees: Highly performing professionals generally prefer to work for companies with high service quality.

It can lead to repeat business: Customers who see their issues and complaints swiftly and efficiently resolved by a company's customer service department may be more likely to buy from that company again in the future.

It strengthens the company's brand: The reputation of a company with above-average service quality can boost sales by attracting new customers or retaining existing ones.

It eliminates certain barriers to buying: High service quality can convince a hesitant customer to make a purchase, as they know that if the service is not right for them, they can rely on strong customer service to remedy the situation.

1.4 Organization quality standards and specifications

1.4.1 Quality standards

Quality standards refer to sets of guidelines, systems, methods, requirements, and specifications followed by an organization to ensure consistent process and product quality. Mostly prevalent in manufacturing, quality standards are established by industry regulatory boards to help drive customer satisfaction and maintain compliance. Globally, ISO quality standards are the most widely accepted set of standards applicable to various industries.

Any product or service that's free from any manufacturing defect, deficiency, or process variation is considered of good quality. This is achieved through the holistic process of quality assurance and quality control.

Thus, to ensure and maintain good manufacturing practices, a set of manufacturing quality standards must be established and followed for the purpose of uniformity across the entire manufacturing process. Additionally, some of the benefits of quality standards include the following:

- Continuous improvement of quality outcomes
- Efficient adherence to regulatory requirements and compliance
- Reduced process variation and product defects
- Improved worker productivity and safety
- Enhanced customer satisfaction
- Seamless flow of operations

1.4.2 Quality Specifications

A specification describes what a customer wants from their suppliers. BS5760 defines a specification as 'a means of communicating in writing the requirements or intentions of one party to another in relation to a product or service, a material, a procedure or a test'.

A specification describes, with other contractual documents, the relationship between a supplier and a purchaser. It is the channel through which information is communicated between them and the main purpose of a specification is communication.

You need to communicate with your supplier to buy products to your required standards at the best price, and the specification is the means of doing this. If your communication is bad, the

resultant product will be bad. Conversely, the better the specification, the better the product or service you will get. A specification describes, with other contractual documents, the relationship between a supplier and a purchaser. It is the channel through which information is communicated between them and The functional specifications will cover such ideas as:

- Product characteristics
- Level of performance
- Level of quality and of safety

At the end of the range is the fully detailed description of how you want your requirements interpreted, how you want the solution to be achieved.

1.5 Unpacking goods using correct handling techniques and equipment

Unpacking: Open and remove the contents of (a suitcase, bag, or package). "Remove (something) from a suitcase, bag, or package. Before you move, or unpack, any stock at all there is one thing you should always do check that the stock you are about to handle is the correct stock. Usually there is a label, or a reference number, to identify the stock. A simple check can save lots of wasted time unpacking or moving the wrong goods, and then having to do everything again.

Correct handling techniques: Many items received into stock will need to be unpacked as part of the storage process. When unpacking stock you must follow all house policies and procedures. For example, if the venue had a „full‟ carton policy in the store rooms you would not unpack individual items from cartons.



Figure 1.6: Correct handling of fruits and vegetable

Unpacking stock can require you to:

- Remove individual items from cartons and/or packaging and load stock into storage bins or storage areas.
- Check the quality and suitability of every item unpacked to ensure:
- Items are not damaged or broken.
- Nothing is leaking.
- No seals are broken.
- Items, cans, drums, bottles, packets and sacks of goods are intact.
- Use-by and/or best-before dates are appropriate to the usage rate of the venue.
- Check to ensure no pests, rodents, vermin or dirt is introduced into the store through the items being unpacked

Verify items look suitable for the purpose they are to be used for using the various senses (smell, sight, touch and taste as appropriate) and a combination of industry and venue knowledge and common sense. This involves a quick check of each item to ensure (as appropriate to the nature of each individual item):

- Linen is the expected/correct colours. If you know the property always uses white sheets, it would cause concern if the delivery of sheets you were unpacking was blue in colours.
- Fruit and vegetables are fit for the purposes they are going to be used for. This may involve checking to ensure food intended to be eaten as is‟ is free from blemishes, are not bruised and are suitable for sale or use.
- Items to be used in stocks, stews and sauces can be of lesser quality but must still meet internal specifications and all food safety requirements.
- Matches the information on the carton or packaging from which it is being taken
- The fitting for light globes matches the fittings in the venue. There is no point stowing „bayonet‟ light fittings in store if the property uses „screw in‟ globes
- Adhere to „full box/carton‟ policy in stores where this is an internal requirement.

Unpacking goods handling (lifting) equipment's

- ✓ electronic bar coding equipment
- ✓ weighing machines
- ✓ thermometers
- ✓ trolley return equipment
- ✓ Pallet lifting
- ✓ cutting equipment
- ✓ protective clothing
- ✓ forklift

1.6 Removing and promptly disposing packing materials

The removal and disposal of waste is an important part in the running of any business. Waste is defined in the directive as any substance or object that is discarded by a waste producer. A waste producer can be any person or organization that produces waste.



Figure 1.7: Waste management of fruits and vegetables

a) Waste disposal method of damaged stock

Landfill: A land fill site, also known as a tip, dump, rubbish dump, garbage dump, or dumping ground, is a site for the disposal of waste materials. Landfill is the oldest and most common form of waste disposal, although the systematic burial of the waste with daily, intermediate and final covers only began in 1940s. In the past, refuse was simply left in piles or thrown into pits; in archeology this is known as a madden.

Incineration: Incineration is a waste treatment process that involves the combustion of organic substances contained in waste materials. Incineration and other high-temperature waste treatment systems are described as "thermal treatment". Incineration of waste materials converts the waste into ash, flue gas and heat.

b) The wastes generated from the stock treated using 3-R :-

- Reduce means that manage waste is to not produced it.
- Reuse means reuse products for the same use and for another process as input.
- Recycle means remanufacture the products or materials and sell it as a new product.



Figure 1.7: waste incinerator equipment

1.7 Checking and validating incoming stock

When suppliers send orders to their customers (usually retailers or distributors), errors sometimes occur. In some cases the product is damaged, the quantity is lacking or the items received don't match the purchase order. Customers must properly validate their incoming shipments of inventory to avoid these potentially costly issues.

1.7.1 Validating inventory

The process of validating inventory receipts varies depending on company policies. The most thorough, yet time consuming method, is to open all boxes to review the contents. Another option is to pick boxes at random from the shipment and check them. The customer can also check the packing slip and compare it with the initial purchase order to see if the order is complete. Some retailers simply use a barcode system that validates each inventory package based on a label provided by the manufacturer or supplier.

Confirm before paying: It is important to validate inventory receipts prior to paying invoices to the supplier. Before sending a check or credit card payment to cover the invoice, the retailer must ensure that the purchase order, invoice, packing slips and actual inventory receipts match. This process is crucial to proper accounting at businesses that order inventory on a regular basis. 'Goods receiving' is the function of checking items delivered to the business, either coming in as new stock or as supplies. This includes inspecting the quality, condition, and quantity of any incoming goods, and allocating them to a space in the warehouse.

All items purchased by the business serve a specific function, whether they are supplies to be used internally, or stock to be on sold to customers. Keeping track of all items coming into the warehouse ensures that that the right products are received and promptly stored in an appropriate place. Following a goods receiving process can help to maintain an efficient warehouse and identify any issues with suppliers.

1.7.2 Step of checking process for incoming stock.

1. Match the delivery to a purchase order

First ensure the delivery has come to the right place by matching the details on the Consignment Note to the Purchase Order raised by your business. The Purchase Order should also be used to check that each item matches the description and quantities ordered. Generally, the boxes or cartons will have a description of the item and quantities of its contents. Ensure you record the following for each new delivery:-

- The date and time goods arrived
- the name of the delivery partner and driver
- Check off quantities and description of goods against purchase order
- Note any discrepancies
- Names of the personnel who performed these checks

Maintaining accurate reports is essential for accurate book keeping as well as resolving any disputes that may arise in the future regarding the items or supplier. If there is no purchase order or record of the order, check with your supervisor or purchasing department before rejecting the goods.

2. Check products are not damaged

Before accepting the delivery, it's important to conduct a quality check to ensure the items are not damaged or malfunctioning. It's not always feasible to open each carton and check every single item, particularly for large shipments. So in these cases you may wish to complete a spot check rather than open each and every carton. Check for signs of breakage or faults, and ensure all items are as described on the purchase order. If any damaged items are found in the delivery, record the extent of the damage on the consignment note and immediately notify the supplier with details of the issue to discuss the next steps.

3. Log received items into your inventory

Enter the items you have received into your warehouse management system as soon as possible, including the date and quantities received. This will allow the stock to be allocated to new orders right away.

4. Allocate storage space for goods

It's important to pack away a new delivery promptly to ensure no items become lost or damaged. Supplies should be distributed to the appropriate person in the business, or packed away in the usual space to be accessed when required. For goods received in as stock, these items will need to be allocated a space in the warehouse for storage until ready to be picked for an order.

5. Notify your accounts payable department

Send a copy of the signed and dated consignment note to your accounts payable team. This information can then be matched with the invoice from the supplier to ensure payments are only made for items that were actually received.

1.8 Inspecting and recording Items received for damage, quality, use-by dates, breakage or discrepancies

Never accept a delivery without doing a visual inspection unless you have signed for it and added. The stock delivered into the property should be checked against the delivery documentation for:

Damage: Make sure there are no leaking containers, no broken bottles, labels are not missing and seals are intact

Quality: Make sure all food is fit for human consumption, to ensure items are of the correct grade or year or style. Ensure items feature the required/ordered characteristics and/or classifications and the required/expected attributes are present

Type and brand: To ensure items delivered match items listed on the paperwork, and to verify the items meet the needs/requirements of the business

Quantity: Checking to make sure all the items listed on delivery documentation has been supplied

Use-by dates: To ensure the items are not out of date, to verify items have not exceeded „best before" dates, and to ensure items have sufficient shelf-life left

Discrepancies: These are differences between what was ordered and what was delivered, and differences between what was delivered and what was listed on the accompanying documentation.

You should also check to ensure the delivery does not bring in pests and rodents, such as cockroaches and mice.

1.9 Recording stock levels and stock systems storing

1.9.1 Stock recording systems

A store ledger or system is a manual or computer record of the raw materials and production supplies stored in a production facility. It is maintained by the person responsible for these assets, such as the warehouse manager.



Figure 1.8: Stock recording systems

A. Computerized systems

Larger properties or organizations with large stock turnover rates tend to use a computerized stock control/management system. They may use an „off-the-shelf" commercially available software package but often use one based on such a package but which has been modified to suit the needs of the individual business taking into account the type of business, what it sells, the number of revenue departments, volume of stock and number of different stock lines. An

electronic (computer-based) stock control system may be integrated with point-of-sale equipment (such as registers/terminals) and accounting software for payment of accounts and generation of invoices. The systems commonly used have been developed for the hospitality industry and are normally supplied with. User training where experts from the company supplying the system provide face to face, on-site training

B. Paper-based systems

Properties operating a paper-based stock control system will use the following internally generated documents as the basis for their system:

- Purchase orders
- Bin cards
- Requisition forms
- Internal transfer sheets
- Sales dockets and cash register audit rolls/tapes recording revenue earned
- Checks recording payment for stock received.

1.9.2 Stock levels

Stock levels need to be monitored to ensure the physical stock-on-hand does not exceed house limits. All venues will want to make sure they do not have „too much" stock-on-hand at any one time. Most properties will want to take delivery of stock, sell it/use it and receive payment for it before they have to pay for it. Many properties will set a numerical minimum, maximum and re-order stock level for items to help in this regard. The minimum stock level is the level below which stock under any circumstances must not fall. The maximum stock level is the most of any item to be in store at any time. The re-order stock level is the stipulated level stock must fall to, before a new stock order can be triggered/placed.



Figure 1.9: Fruit and vegetable stock

a) Monitor stock levels

- Use-by dates
- Where items have use-by dates, it is illegal to use this food or beverage after the stated date because there may be a food safety risk.
- Best-before date

If a food or beverage has a best-before date, this means the product will lose some of its quality after the given date but will not present a health hazard/food safety risk. Items can be legally and safely used after the „best-before“ date.

The recording of stock movements is an important part of stock control. Stock recording systems should be in place e.g.

- Bin Cards for each item of stock held, recording all stock removed and added
- Stock Record Cards (which will also show prices of receipts and issues of stock)
- Computers Spread sheet showing all movement of stock
- The type of production process

The nature of materials:

- E.g. are they flammable or not?
- Are they perishable?

The time taken to transport the materials from the stores to the production cost centers. How and where stock is stored will depend upon:

- The weight of the goods
- The bulkiness of the goods
- The risk of physical deterioration
- The risk of theft

Physically checking your stock is necessary to ensure that stock records are accurate and as a deterrent against theft. Stock taking can be:

- Periodic i.e. annually
- Perpetual i.e. ongoing where the balance of stock is updated after every receipt and issue
- Stock Levels advantage and dis advantage

There are disadvantages in having too much stock or too little stock .Overstocking causes:

- High storage costs
- Cash being paid out before it is necessary
- High risk of deterioration or obsolescence

Under stocking causes:

- Running out of stock and holding up production
- Customers going elsewhere if production is halted

1.10 First in first out (FIFO) principle

FIFO stands for first in, first out, an easy-to-understand inventory valuation method that assumes that goods purchased or produced first are sold first. In theory, this means the oldest inventory gets shipped out to customers before newer inventory. The first in, first out (FIFO) method of inventory valuation is a cost flow assumption that the first goods purchased are also the first goods sold. In most companies, this assumption closely matches the actual flow of goods, and so is considered the most theoretically correct inventory valuation method. The FIFO flow concept is a logical one for a business to follow, since selling off the oldest goods first reduces the risk of inventory obsolescence.

The FIFO method is used for cost flow assumption purposes. In manufacturing, as items progress to later development stages and as finished inventory items are sold, the associated costs with that product must be recognized as an expense.

Under the FIFO method, the earliest goods purchased are the first ones removed from the inventory account. This results in the remaining items in inventory being accounted for at the most recently incurred costs, so that the inventory asset recorded on the balance sheet contains costs quite close to the most recent costs that could be obtained in the marketplace. Conversely, this method also results in older historical costs being matched against current revenues and recorded in the cost of goods sold; this means that the gross margin does not necessarily reflect a proper matching of revenues and costs. For example, in an inflationary environment, current-cost revenue dollars will be matched against older and lower-cost inventory items, which yields the highest possible gross margin.



Figure 1.10: First in first out (FIFO) principle in fruit and vegetable

1.11 Rotating and storing stock

To rotate stock means to arrange the oldest units in inventory so they are sold before the newer units. For example, a grocery store will restock its shelves by putting the oldest units in the front part of the shelves. The newest units will be placed in the back of the shelves. The hope is that the customer will select the most convenient (older) units from the front of the shelf. It is important to rotate stock in all areas of retail display area, warehouse, factory, etc.

The reason to rotate stock is to reduce the losses from deterioration and obsolescence. Ideally, when a company rotates its stock the units are physically flowing first-in, first-out (FIFO). However, in the accounting for the cost of inventory and the cost of the goods sold, the company may use a cost flow assumption which is different from the flow of the physical units. For example, a U.S. company may use the last-in, first-out (LIFO) cost flow assumption even though it diligently rotates its stock of goods. It is standard procedure all stock delivered into a venue needs to be rotated so the older stock is used before the newer stock.

The Importance of stock rotation: Stock rotation must be applied to help avoid situations such as:

- Stock loss due to items becoming out of date stock.
- Stock looking old and tired by virtue of spending too long in storage. This stock is unattractive and customers will not buy it.
- Damage to stock or a reduction in quality that may occur if stock spends excessive time in storage. The longer an item spends in storage the greater the risk of damage to it.
- Does stock rotation apply to all stock?

Generally speaking, yes. However there are limited instances where certain products may be bought with the deliberate intention of not rotating them. For example: Some wines may be bought and cellared for future use as a specific strategy to increase their value Some meat may be purchased and deliberately kept to „age“ it.

FIFO principle stock rotation option: The four stock rotation options are:

- First In, First Out (FIFO)
- First In, Last Out (FILO)

- Last In, First Out (LIFO)
- Last In, Last Out (LILO)

FIFO, First-In, First-Out, is important for companies that distribute products with expiration dates or perishables, such as pharmaceuticals, food, and beverages. It's a safe practice that ensures your products will not expire or go bad. With FIFO, the oldest products are used or picked first, ensuring product quality and safety. FIFO works for items in any type of packaging, whether it's a can, bottle, or carton. FIFO can be used for fresh, frozen, or canned items as well. It's important for good stock rotation to use the oldest stock first. When used correctly, the FIFO rotation method ensures companies are serving safe products and reducing spoilage.

LIFO: The **last in, first out (LIFO)** method assumes the reverse of the FIFO method: The products most recently purchased are used first. The value of inventory is represented by the unit cost of items in inventory the longest. LIFO assumes that the last items put on the shelf are the first items sold. Last-in, first-out is a good system to use when your products are not perishable or at risk of quickly becoming obsolete.

Using LIFO, if the last units of inventory bought were purchased at higher prices, the higher-priced units are sold first, with the lower-priced, older units remaining in inventory. This increases a company's cost of goods sold and lowers its net income, both of which reduce the company's tax liability. This makes LIFO more desirable when corporate tax rates are higher.

1.12 Dispatching stock to appropriate area or department

Once stock has been received, it must then be transported to the appropriate storage or operational area, as required. All items should be transported promptly, safely and without damage**.**

Importance of dispatching the Stock to appropriate area: stock should be promptly moved from the delivery area in order to:

Allow space for further incoming items to be unloaded/delivered. The delivery area is a bottleneck for stock movement and can quickly become chaotic if stock is not moved quickly through the area.

Remove potential hazards. Stock left lying around presents a tripping risk.

Minimize the chance of theft. Quickly securing stock in its appropriate storage area greatly reduces the likelihood of theft. Remember members of the public, other delivery drivers, and staff all has the potential to steal stock.

Reduce the likelihood of damage to products. Cartons and items in a cluttered and busy receivable area can suffer more damage the longer they are left there.

Eliminate confusion regarding stock checks and counts. It can be difficult to distinguish different orders when the receivable area is full or cluttered.

Maintain the safety of food. Refrigerated and frozen food must be stored under appropriate conditions, or taken as soon as possible to the areas/kitchens where it will be used.

The following are some of the standard procedures when dispatching supplies from the storage site:

- ✓ Products should spend as little time as possible in storage; hence the rotation of the stocks on the basis of "first in, first out". The items that have been in the warehouse longest should be placed in the front rows of the stowage racks so they can be distributed first, and the items that come in later are to be placed at the back, rotating them to the front as deliveries are made;
- ✓ The same principle applies to products with an expiry date: the first to be dispatched are those nearest their expiry date;
- ✓ A dispatch can only be carried out with an official authorization document that has been signed by the person authorized to do so.
- ✓ The same procedure of physical and documentary verification that was carried out when goods entered the warehouse must be carried out when they leave the warehouse, to make sure that the supplies that are being delivered correspond to the packing list or other identification documents;
- ✓ Every dispatch must be recorded so it can be withdrawn from the inventory records.

1.13 Applying Stock price and coding labels

Exactly what constitutes a label varies. There are three common, generic styles of labels:

- ✓ An adhesive label peeled from a roll of pre-printed labels
- ✓ A computer-generated „document“ printed out from the stock management system

- ✓ A simple hand-written note or adhesive label with the relevant information written on the label with a marking pen.

Supplementary reasons labels are used on stock items. Labels will mainly serve to identify the item but information on the label may also include:

- ✓ Directions to staff – "Use this first", "Check with Graham before using"
- ✓ Advice to staff – "Last one – no more being ordered"
- ✓ Allocation of items – "For use by Kitchen/John Barnes only".

Most stock delivered to a venue will already be labelled sufficiently for the purposes of storage and general use of the item. Where items are delivered without some form of appropriate identification, wrapping or labelling, or where you need to take individual items out of packets, cartons or wrapping you may need to provide your own labels for these items.

Labelling requirements: Activities involved in labelling stock can includes physically placing existing labels on storage containers and shelving in order to

- ✓ Identify the stock items
- ✓ Display delivery date
- ✓ name of product and a description e.g. what is contained in cooked items
- ✓ date of delivery
- ✓ use-by date

Preparing hand-written and/or computer-generated labels and attaching them to individual stock items using electronic bar coding and labelling equipment and attaching labels to:

- ✓ Shelves
- ✓ Containers
- ✓ Individual stock items

Observing food safety requirements in relation to the labelling of food such as:

- ✓ Labels, tags or spikes must not make direct contact with food
- ✓ Ensure day/date and time of delivery is noted on label
- ✓ Any re-packaged food items must be labelled with details of the original package/item.

Labels for stock items are usually positioned immediately above or below the item/shelf. In some cases a label may actually be attached to the item itself. The primary purpose of clear and

accurate labelling is to identify clearly the items in stock; on the shelf or in other storage areas. For example, it is virtually impossible to visually differentiate between:

- ✓ Single bed sheets
- ✓ Double bed sheets
- ✓ Queen-size bed sheets
- ✓ King-size bed sheets

When they are folded and sitting on a shelf. Appropriate labelling overcomes this problem helping staff to easily identify and access the correct size sheet and also helps with the placement of stock on shelves or into storage bins.

Self-check 1	Written test

Name----------ID----------Date----------

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Part I: Say true or false

1. Procedures are a road map for success**.**
2. Store policies can help protect your company from disputes by eliminating unnecessary friction.
3. Store policy and procedure provides a overall framework for the fiscal operations of stores
4. Dust accumulation can cause major issues for a facility, including poor air quality, fire and explosion hazards, and malfunctioning equipment**.**
5. Cleaning and tidying as part of other store room activities.
6. Service delivery is a business framework that supplies services from a provider to a customer.
7. Service delivery simply refers to the delivery of a service from customer to a business.
8. A quality standard describes what a customer wants from their suppliers.
9. Quality standards refer to sets of guidelines, systems, methods, requirements, and specifications
10. Specification is the channel through which information is communicated.
11. After you move, or unpack, any stock at all there is one thing you should always do check that the stock is the correct stock.
12. When unpacking the stock you should not follow all house policies and procedures.
13. The removal and disposal of waste is not an important part in the running of any business.
14. Waste is defined in the directive as any substance or object that is discarded by a waste producer.
15. The process of validating inventory receipts is the same depending on company policies.
16. Before accepting the delivery, it’s important to conduct a quality check to ensure the items are not damaged or malfunctioning.

17. You should check to ensure the delivery does not bring in pests and rodents, such as cockroaches and mice.
18. Discrepancies mean the differences between what was ordered and what was delivered.
19. There are disadvantages in having too much stock or too little stock.
20. Physically checking your stock is necessary to ensure that stock records are accurate and as a deterrent against theft.
21. The first in, first out (FIFO) method of inventory valuation is a cost flow assumption that the first goods purchased are also the first goods sold.
22. The FIFO method is used for cost flow assumption purposes.
23. Last-in, first-out is a good system to use when your products are perishable or at risk of quickly becoming obsolete.
24. The standard procedure all stock delivered into a venue needs to be rotated so the older stock is used before the newer stock.
25. Once stock has been received, it must be transported to the appropriate storage or Operational area, as required.
26. A dispatch can only be carried out with an official authorization document that has been signed by the person authorized to do so.
27. Labels for stock items are usually positioned immediately above or below the item/shelf.

Part II: Choose the correct answer

1. Which One of the following factors is not consider during storage?
   A. Clean Storage Space
   B. Regulate Pressure
   C. Monitor the Temperature
   D. Handle all produce with care
2. Storage through manufacturing and warehousing shall:
   A. Prevent mix-ups
   B. Prevent contamination or other adverse effects
   C. Protect from damage and/or deterioration
   D. All

3. The general requirements commonly applied industry-wide in order to maintain a stock area are:
   A. Keeping the stores area clean and tidy at all times
   B. Protect against damage that can occur to items left lying around in the delivery
   C. Storing all stock as soon as possible after delivery.
   D. all
4. Identifying and removing unsafe, unusable or unsalable items from the storage areas such as:
   A. Damaged items
   B. Food that has exceeded its use-by date
   C. Food contaminated by vermin
   D. Cleaning up spills as they occur
   E. None
5. One of the following is not among the four logically sequenced steps or areas that companies use to provide the best customer experience through their service delivery?
   A. Service Quality
   B. Employee Engagement
   C. Service Culture
   D. Producer Service
6. _____ is a measure of how an organization delivers its services compared to the expectations of its customers
   A. Service Delivery
   B. Service Quality
   C. Food Service
   D. All
7. Which one of the following is not ideas of functional specifications?
   A. Product characteristics
   B. Level of performance
   C. Product labelling
   D. Level of quality and of safety
8. Which of the following is correct about benefits of quality standards?

A. Enhanced customer satisfaction
B. Continuous improvement of quality outcomes
C. Reduced process variation and product defects
D. All

9. Check the quality and suitability of every item unpacked to ensure:
   A. Items, cans, drums, bottles, packets and sacks of goods are intact
   B. Nothing is leaking
   C. No seals are broken.
   D. Items are not damaged or broken
   E. All
10. Which one is Unpacking goods handling (lifting) Equipment's?
   A. electronic bar coding equipment
   B. weighing machines
   C. thermometers
   D. forklift
   E. All
11. ----------is a waste treatment process that involves the combustion of organic substances contained in waste materials?

A. Incineration C. Transportation
B. Landfill D. Decomposition

12. ---------- is the oldest and most common form of waste disposal, although the systematic burial of the waste with daily, intermediate and final covers only began in 1940s.
   A. A. landfill C. Recycle
   B. B. Incineration D. Reuse

13. Which one is the Checking process of incoming stock?
   A. Check products are not damaged
   B. . Notify your accounts payable department

C. Allocate storage space for goods
D. Match the delivery to a purchase order
E. ALL

14. Which one is the necessary things ensure you record when delivery new goods?

A. The date and time goods arrived
B. the name of the delivery partner and driver
C. Check off quantities and description of goods against purchase order
D. Note any discrepancies
E. Names of the personnel who performed these checks

None

15 The stock delivered into the property should be checked against the delivery documentation for:

A. Damage
B. Quality
C. Type and brand
D. All

16 Make sure there are no leaking containers, no broken bottles, labels are not missing and seals are intact. It refers----------.

A. Quality
B. Damage
C. Best before‟ dates
D. All

17. Overstocking causes:

A. High storage costs
B. Cash being paid out before it is necessary
C. High risk of deterioration or obsolescence
D. all

18. Before a new stock order can be triggered/placed Monitored

A. Use-by dates

B. Best-before date

C. Bin cards

D. all

19. _____ is important for companies that distribute products with expiration dates or perishables, such as pharmaceuticals, food, and beverages

A. LIFO B. FIFO C. LILO D. ALL

20. Importance of Dispatching the Stock to appropriate area.

A. Allow space for further incoming items to be unloaded/delivered.

B. Remove potential hazards

C. Maintain the safety of food

D. ALL

21. The standard procedures when dispatching supplies from the storage site:

A. The same procedure of physical and documentary verification that was carried out when goods entered the warehouse.

B. The same principle applies to products with an expiry date: the first to be dispatched are those nearest their expiry date.

C. Products should spend as little time as possible in storage.

D. None

22. Physically placing existing labels on storage containers and shelving in order to

A. Identify the stock items

B. Display use-by date

C. Delivery date

D. Name of product and a description

E. None

23. The importance of labeling

A. Directions to staff C. Advice to staff

B. Allocation of items D. All

Part III: Short Answer Questions

1. Write the five methods of storing vegetables and fruit?
2. List the significance of store policy and procedure?
3. How to clean the storage room?
4. Write the five dimensions of service quality?
5. Write the difference between quality standard and specification?
6. Define the Correct handling techniques of goods and equipment?
7. Define the difference between recycling and re use of waste?
    a. Define how to reduce waste?
8. What is the difference between LIFO and FIFO?
9. Write the advantage of stock rotation?
10. What is the advantage of stock labeling?
11. What is the requirement of stock labeling?

LG #24 | LO #2- Rotate stock

Instruction sheet

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Caring out stock rotation procedures according to store routine and policy.
- Reforming store code checking and reporting procedures.
- Placing merchandise and promoting sales.
- Placing excess stock in storage or disposing.
- Store OHS policy and legislative requirements.
- Maintaining safe lifting, shifting and carrying techniques

This guide will also assist you to attain the learning outcomes stated in the cover page. Specifically, upon completion of this learning guide, you will be able to:

- Caring out stock rotation procedures according to store routine and policy.
- Reforming store code checking and reporting procedures.
- Placing merchandise and promoting sales.
- Placing excess stock in storage or disposing.
- Store OHS policy and legislative requirements.
- Maintaining safe lifting, shifting and carrying techniques

Learning Instructions:

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below.
3. Read the information written in the information Sheets
4. Accomplish the Self-checks
5. Perform Operation Sheets
6. Do the “LAP test”

2.1 Caring out stock rotation procedures according to store routine and policy

If food is taken out of storage or put on display, it should be used in rotation. Food stock rotation consists in using products with an earlier use-by-date first and moving products with a later sell-by date to the back of the shelf. This ensures that food is used within date and prevents unnecessary and costly waste (of food that has passed its expiry date). Stock rotation applies to all food types but is particularly important for high-risk food. The following steps are essential to implement a solid food stock rotation:

- Checking dates on food when it is delivered, used or put on display
- Storing or displaying food with a short shelf life at the front of the shelf
- Storing or displaying food with a longer shelf life at the back
- Always using food in the correct order
- Checking that food is in good condition before using it
- Removing any out-of-date stock from storage or display

Five benefits of FIFO include:

Reduce spoiled and expired products: When you ship out the oldest stock first, you increase the chance that the item will sell before it reaches its expiration date. This can help businesses reduce the quantity of inventory that remains unsold, helping them improve profits.

Reduce obsolete inventory: Obsolete inventory refers to products that are outdated and no longer useful to consumers. When products are moving in and out of the warehouse quickly, you can reduce the chances of an item becoming obsolete before it is ultimately sold to a consumer.

Make quality control easy: Another benefit of using FIFO is that quality control becomes simple. Shipping products in the order you get them makes it easy to track deliveries. If a product is bad, you know what supplier brought it in and when it was received.

Minimize the impact of inflation: Inflation refers to the increase in prices over time. FIFO can reduce the impact of inflation on suppliers, retailers and ecommerce businesses. Because the old product is the first sold, it might have cost less to make than newer inventory. This keeps prices accurate and helps retailers and ecommerce businesses manage inventory and profits.

Keep current inventory value: Using FIFO procedures in your warehouse can help suppliers, retailers and ecommerce businesses keep current with inventory value. As items purchased are pulled from shelves, the inventory system includes the most recently purchased inventory. This

helps make sure that the inventory value and cost of goods sold is reflective of current market prices.

2.2 Reforming store code checking and reporting procedures

Any unique identifier can be a store code. A store code can be anything from the name of a place to a random number, as long as it stays the same to refer to that location. Include your brand name in your store code to avoid confusion between spreadsheets (for separate business or personal accounts). Store code and material identification has witnessed great transformation in recent times due to technological advancement. Consequently, the risk of store personnel has become far easier, more efficient, and cost effective and all major operations are executed with high level of accuracy. Store code and material identification is an aspect of store management that enjoys this transformation. The process of indexing, coding and sorting has improved significantly with computer system application across different purchasing organization. Materials brought into stores are immediately assigned system code and file names for easy identification. This is necessary to avoid problems of multiplicity of inappropriate or incorrect names assigned to materials. Invariable, the vocabulary of identification and coding are separate concepts that are independent and mutually exclusive. Although, it is possible to have a good vocabulary in an organization not using a coding system.

Identification of material successfully in inventory management is greatly aided by a logical system of classification covering all inventory items for the purpose of code. Identification is the process of systematically defining and describing all items in store. The preparation and maintenance of store vocabulary is essentially or technically efficient. Vocabulary lies with the stores managers and his team who is responsible for the managing efficiency.

Vocabulary includes the development of a technical for ensuring that words describing the articles or materials are sequence of importance. Whether or not a code system is at use, this technique should be employed. An efficient code system assists the store personnel in the controlling of the stock and easy identification of materials without wasting time. And vocabulary on the other hand is the transfer to writing of the things which has been recognized.

Unfortunately, the users from the various functions department tend to draft the description according to their use of the items. You've got a collection of new products that you're keen to enter into your inventory management system. These products may also be listed through other channels, such as your e-commerce store, or linked to your point-of-sale in your bricks and mortar shop. You may be wondering what will be the best way to track these items is - how many of each size and colours are in the store or warehouse? If you're not familiar with what a SKU (Stock Keeping Unit) is, read on.

Skus: Good product codes (often referred to as skus) are keys to maintaining accurate stock control within your business and ensure that your staff can find and sell the correct product. A well-considered alphanumeric SKU is generally more memorable than a barcode, which is a long string of numbers that is not unique to your business. Consistent format and length across your skus helps with product segmentation, makes your invoices look neat and professional, and means customers can re-order the same product easily by quoting a product code unique to your store. Clever abbreviating of product details in an alphanumeric code means it is easy to add new products to your system in the future if a supplier expands their range.

In this blog, we will explore some of our top tips and tricks for creating meaningful product codes.

1. Product codes must not start with 0. When you import product lists into your new inventory system, you will usually be asked to upload a Microsoft Excel CSV file (.csv). Microsoft Excel drops the leading 0 on any number that starts with 0 e.g. "0512" becomes "512", meaning the product code has changed and is no longer accurate.

2. Keep it short and sweet, but not too short! We recommend using skus that are a minimum of 4 characters (for smaller inventories) and a maximum of 12 characters. Longer product codes are harder to print out on product labels and may get split onto two lines on an invoice. A SKU of 1-3 digits may be mistaken for a quantity value.

3. Try not to use your supplier's product code as your product code**.** If the supplier changes their product code in the future, you will be left with a number that does not have any meaning to your organization and it will make reordering more difficult with both your suppliers and customers. Create a SKU that is meaningful for you and your staff.

4. We recommend using uppercase letters, numbers and dashes (-) only in your product code. Special characters tend to cause issues when syncing products across multiple sales channels and most often are not translated correctly in Microsoft Excel when exported to a spreadsheet. It is good practice to use both letters and numbers in a Product Code, as there can be no possible way that the value could accidentally be altered.

5. Consider using a few common letters as a prefix to categories and group products. If we sell coffee, biscuits and tea:

- All products in the "Coffee" group will start with "COF"
- All products in the "Biscuits" group will start with "BIS"
- All products in the "Tea" group will start with "TEA"

If we have 20 different flavors of biscuits, we can assign a sequential number to each different type of biscuit.

- BIS-01
- BIS-02
- BIS-03 etc.

This also means if staffs are looking up codes, it will be faster for them to find products within a certain group.

6. Use suffixes separated by dashes to identify product variants.

Clever use of dashes can be used to denote product variants such as size or color. If we've got a t-shirt, we might start with "TEE01" as the base part of the SKU. We then add a dash and a two-letter colours code:

E.g. .TEE01-RD - A red t-shirt TEE01-BL - A blue t-shirt

Keep the colours code to two or three letters/numbers maximum where possible. These t-shirts come in 3 sizes, small, medium and large. We will add another dash and the size code: TEE01-RD-S TEE01-RD-M TEE01-RD-L TEE01-BL-S TEE01-BL-M TEE01-BL-L

Now we have all the codes generated for our six unique t-shirts.

7. Set up a product code naming convention, and stick to it! Using the example outlined in point 6, if in the future our supplier starts stocking yellow t-shirts in the design "TEE01", we can easily add "TEE01-YL" as a new SKU to keep the product code consistent with our existing products. If more than one staff member is responsible for product entry, ensure there is a checklist and instructions for the correct formatting of new product codes.

8. Make all your skus the same length. Following on from the last point, a great way of making our skus look more consistent is to make them the same length, and if we do use dashes in the skus, make sure these are in the same place:

TEE01-YL - a yellow T-shirt JUM01-BL - a blue jumper BEA02-PK - a pink beanie

9. Try not to use letters that could be mistaken for numbers, such as "O" and "I". This may result in products not being able to be found in the system, or incorrect product codes given out to customers.

10. Don't use letter or number sequences that could be mistaken for a date value. When exporting a product list to Microsoft Excel, SKU values such as "AUG-30" could be read as a date when opening the product file meaning this SKU may be unexpectedly changed to "30/08".

Using these tips to streamline your inventory catalogue can assist with:

- Tracking stock levels more accurately
- Easier reordering of stock
- Making your sales and fulfillment processes more efficient
- Improved assisting with customer enquiries and orders
- Streamlining your invoices to look neat and professional
- Adding new products in the future

2.3 Placing merchandise and promote sales

When it comes to visual merchandising, retail displays are where most of the action happens. Knowing the different types of retail displays and how they are used across a variety of product categories is critical to making an impact on sales

2.3.1 Types of stock display and advantages

1. Retail Display: A retail display is anything in a store that houses or promotes your product. A visual merchandising strategy focuses heavily on the appearance of retail displays, as they are often the first point of contact between your product and the shopper.

Any brand that sells at retail will use retail displays. Visual merchandisers are usually the ones to design and implement retail displays and are also in charge of making sure the displays maintain their appearance over time.

2. Standalone POP Display: A POP display, also known as a point of purchase display, is any store display that draws attention to your product.

A standalone display is a type of POP display that exists separately from traditional aisle shelves. These displays often appear in the middle of large store aisles called “action alleys,” or anywhere else in the store where there is open space. Standalone displays play a huge role in a brand’s visual merchandising strategy and should be carefully designed to stand out within a retailer.

3. Dump Bins: Dump bins certainly live up to their name they are literally giant bins in stores that are commonly stocked with individually packaged products. You’ll often see them full of candy other small products that provoke impulse buys.

A great advantage of dump bins is that they are standalone displays, and can be strategically placed to be seen or interacted with from all angles. They are also usually made out of cardboard or are otherwise customizable, so bins are not only a great opportunity to get creative with how you project your brand’s image, but they’re also easy for your field team or distributor to ship and set up.

4. Freestanding Displays: Freestanding displays are similar to dump bins in that they are also standalone displays and can be interacted with from 360 degrees. That being said, they are more organized in appearance than dump bins, and often neatly display slightly larger products on shelves or hooks. Like dump bins, freestanding displays are also commonly made out of cardboard, so they are a great chance to experiment with some attention-grabbing shapes or designs.

5. Entryway Displays: Displaying your products near entryways can put your brand at the top of shoppers' lists before they even see your competitors. Entryway displays are effective at encouraging impulse buys, as customers at the beginning of their shopping trip are entering the store ready to spend money. If you’re lucky enough to be in a place with nice weather, setting up an outdoor entryway display is a great way to catch shoppers’ attention before they even get inside.

6. Gondola Displays: Gondolas are two-sided, standalone shelving units that also appear in larger, more open areas of a store. They have adjustable shelves, which makes them customizable to accommodate different sized products. While they typically are made with steel frames and pegboard, there are options for brands to promote their product through graphics and an attractive color scheme

7. Window Displays: Window displays, also known as window dressings, are exactly what they sound like product displays that are set up in the window of a retailer. These displays are extremely lucrative as they represent the retailer and can be the deciding factor on whether a shopper enters the store in the first place. If given the opportunity to occupy a window display for your product, it is imperative to create a visually appealing design that will positively represent your product and the retailer.

Banner stands are standalone signage that brands can place throughout the store to feature their product or announce a promotion. Banner stands are inexpensive, mobile, and effectively catch shoppers' attention. When creating a banner stand, always remember that less is more you don't want to overwhelm the shopper, so avoid using too many colors or providing more written information than what the shopper would be willing to read. If your banner stand is not located next to your product, you can include a message within the graphic on where it can be found in the store.

8. Retail Shelving Display: Shelving displays are any type of display that exists on a traditional store shelf. They utilize the space provided by these shelving units to showcase products, feature signage, and interact with shoppers.

9. End Cap Displays: End cap displays are the shelves at the end of a two-sided retail shelf which the shopper passes by when going from one aisle to another. Like free standing displays, end caps allow you to place your product in relevant areas beyond typical aisle shelf space. They also give you a prime location to attract a lot of eyes shoppers walking through action alley can see your products without even going down the aisle, giving you a major advantage over your competitors.

2.4 Placing excess stock in storage or disposing

Identification and disposal of obsolete and surplus stocks: The major causes of obsolete and surplus stocks are the over estimation of requirements, changes in product design, standardization, and bulk purchases. The following measures are suggested to reduce obsolescence:

- Changes in design and production schedules should be made when stocks are at a minimum level.
- Estimates of requirements should not be based on historical consumption data alone.
- Planning for A and B items must be done more accurately than for C items.
- Discounts should be negotiated only if the additional items are absolutely essential.
- Standardization must be implemented when stocks are low.
- The volume of orders for spare parts should be examined when new equipment is bought. Information on consumption of spares for similar equipment should provide guidance and other organizations may be consulted.

The following steps should be taken to identify and dispose of useless stocks.

a) A periodic review of stocks is carried out to identify slow-moving and non-moving items which need not be kept in stock. Slow-moving items are those which have been kept for at least one year and non-moving items are those which have been kept for two or three years.
b) In addition, there may be excessive stocks (which will last for more than a year) of certain items. A list of slow- and non-moving items and excessive stock items should be prepared, indicating the value of these stocks and when they were last issued.
c) Since the list may include items which could be required in future, it has to be circulated so that all departments can identify items which might be used, items which need modification and items which cannot be used.
d) It is then necessary to prepare a list of items which cannot be used within the organization.
e) This list should be sent to similar organizations, suppliers, dealers and other probable users for sale or exchange.
f) If there is no possibility of sale or exchange, the items may be donated to educational institutions or sold to employees.
g) Items which cannot be disposed of otherwise should be offered at auction
h) Proper storage methods

Proper stores layout permits easy access to materials, better space utilization and reduced need for handling within the stores; it also minimizes damage, deterioration and pilferage, and permits easy checking. Racks and other facilities are arranged to minimize the distance travelled when materials are received and issued.

The method of storage will depend on the size, shape, type and quantity of the item. Optimum space requirements can be worked out for each type of item and matched with the floor layout of the stores to indicate the best arrangement of stocks and placement of facilities. Items requiring specific conditions such as refrigeration should be identified. Items should be grouped according to frequency of use, shape, size, and weight to determine overall layout and storage methods. Fast-moving items are stored nearest to the issue window while slow-moving and other items are kept upstairs and on the top or bottom shelves of the racks to save labor cost.

- Some of the rules for developing proper stores layout are as follows.
- Space utilization should be maximized by making full use of the vertical dimension.
- Items should be banned by groups or classes to reserve space for each group.
- Materials should be properly labelled showing class and code to permit easy identification.
- The principle of "first in-first out" will help reduce deterioration, particularly for perishable goods.
- As far as possible binning should facilitate counting of materials.
- Materials should be obtained, stored and issued in unit loads to reduce handling.
- Proper storage and preservation methods should be used for each item. For example, inflammable materials must be stored in tightly closed containers away from the main building.

2.5 Store OHS policy and legislative requirements

The Workplace Health, Safety and Wellbeing policy reflects our commitment to a safety culture that extends beyond the once traditional view of physical injuries sustained from accidents in the workplace to the physical and psychological health and wellbeing of staff. According to WHO (1995), occupational safety and health can be defined as a multidisciplinary activity aiming at:

- Protection and promotion of the health of workers by eliminating occupational factors and conditions hazardous to health and safety at work
- Enhancement of physical, mental and social well-being of workers and support for the development and maintenance of their working capacity, as well as professional and social development at work
- Development and promotion of sustainable work environments and work organizations

The ILO/WHO definition of occupational health is “The promotion and maintenance of the highest degree of physical, mental social well- being of workers in all occupation” and the WHO considers occupational health service to be responsible for the total of worker and, if possible, his or her family. Occupational Health is a diverse science applied by occupational health professionals engineers, environmental health practitioners, chemists, toxicologists, doctors, nurses, safety professionals and others who have an interest in the protection of the health of workers in the workplace. Occupational health and safety is one of the most important aspects of human concern. It aims an adaptation of working environment to workers for the promotion and maintenance of the highest degree of physical, mental and social wellbeing of workers in all occupations. The discipline covers the following key components:

1. The availability of occupational health and safety regulations at workplace
2. The availability of active and functional occupational health and safety committee at workplace
3. Monitoring and control of factory hazards to health
4. Supervision and monitoring of hygiene and sanitary facilities for health and welfare of the workers
5. Inspection of health safety of protective devices
6. Pre-employment, periodical and special health examination.
7. Performance of adaptation of work to man
8. Provision of First Aid
9. Health education and safety training to the worker
10. Advice to employers on the above mentioned items
11. Reporting of occupational deaths, diseases, injuries, disabilities, hazards and their related preventive measures at working

According to a statement by occupational health institutes collaborating with the WHO (1995) the most important challenges for occupational health for the future will be:

- Occupational health problems linked to new information technologies and automation;
- new chemical substances and physical energies;
- health hazards associated with new biotechnologies;

- transfer of hazardous technologies;
- aging working populations;
- special problems of vulnerable and underserved groups (e.g. chronically ill and handicapped), including migrants and the unemployed; and,
- Problems related to growing mobility of worker populations and occurrence of new occupational diseases of various origins.

The question of occupational health and safety, as a global issue, is now taking a new turn. The main contributory factors towards this idiocyncracy seem to be due to the rapid industrial and agricultural development that are taking place in the developing countries, and the emergence of new products and product processes from these places. The benefit of occupational health service in developing countries is seen locally as well as on a national level. The positive impact of occupational health service locally may be observed in reducing morbidity and work-related injuries. In addition, this also means fewer losses to employer and worker as there will be a reduction of wage losses and decreased compensation costs. The reduction of absenteeism is of great importance concerning skilled labour, especially so in countries where there is a shortage of skilled labour.

Making working conditions healthy and safe is in the interest of workers, employers and governments, as well as the public at large. Although it seems simple and obvious, this idea has not yet gained meaningful universal recognition. Hundreds of millions of people throughout the world are employed today in conditions that breed ill health and/or are unsafe.

Government legislation is what provides workers with minimum standards of health and safety in the workplace. Minimum standards, however, can always be made more protective with stronger legislation. Historically, many trade unions have been successful in pressuring governments to enact health and safety legislation, to make legislation more protective and to enforce the laws. Today it is still important for unions to organize and fight for stronger and more protective occupational health and safety legislation at the national, state or provincial levels.

While health and safety legislation provides the legal backbone to protect workers, it is only effective when supported by government enforcement. Without adequate legal enforcement, some employers do not feel motivated to take workplace regulations seriously, particularly since many governments still do not prosecute employers who violate workplace regulations.

Since many governments do not have enough adequately trained inspectors to inspect every workplace regularly, it is up to workers and unions to be the regular "workplace inspectors" and make sure employers are complying with existing laws and standards. To do this effectively, you must be familiar with the health and safety laws that protect you.

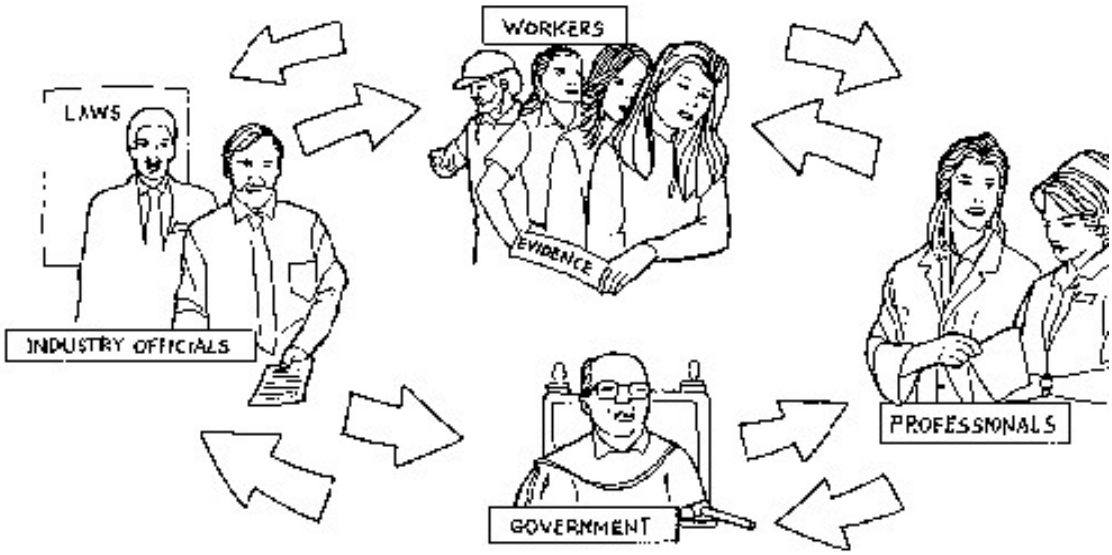


Figure 2.1: Workers health and safety

Workers, industry officials, health professionals and government officials all have responsibilities for health and safety.

	Points to remember
1. Legislation provides workers with minimum standards of protection in the workplace.	

2. Minimum standards can be made more protective by strengthening government legislation.
3. Legislation is only effective in protecting workers when it is supported by government enforcement.
4. Since many governments do not have enough inspectors to inspect every workplace regularly, it is up to workers and unions to be the regular "workplace inspectors".

Points to remember about legislation

1. The legislation in your country is what provides you with your basic rights for health and safety in the workplace.

2. Four general terms commonly used in health and safety legislation are: **act, regulation, code of practice, guide.** The terms used in your own country's legislation may be slightly different. Try to become familiar with the terms used in your country's legislation.

3. Act: states general health and safety principles, duties, etc.;

- fully supported by law;
- made or approved by governments/parliaments.

4. Regulations:

- provide specific health and safety rules within the limits of the health and safety act;
- fully supported by law;
- adopted and amended by cabinet or the relevant minister.

5. Codes of practice:

- provide general guidance on ways to comply with regulations;
- not backed by law but can be used as evidence in legal proceedings;
- adopted and amended by the relevant government body,

6. Guides:

- provide detailed technical information and recommendations to help employers comply with health and safety regulations;
- not backed by law;

- adopted and amended by the relevant government body. ILO guides may be adopted by governments.

7. It is your right to see your country's occupational health and safety legislation. Reading the legislation will tell you what workplace protections are guaranteed to you by law.

2.6 Maintaining safe lifting, shifting and carrying techniques

2.6.1 Lifting and material handling

Lifting heavy items is one of the leading causes of injury in the workplace. In 2001, the Bureau of Labor Statistics reported that over 36 percent of injuries involving missed workdays were the result of shoulder and back injuries. Overexertion and cumulative trauma were the biggest factors in these injuries. Bending, followed by twisting and turning, were the more commonly cited movements that caused back injuries. Strains and sprains from lifting loads improperly or from carrying loads that are either too large or too heavy are common hazards associated with manually moving materials. When employees use smart lifting practices, they are less likely to suffer from back sprains, muscle pulls, wrist injuries, elbow injuries, spinal injuries, and other injuries caused by lifting heavy objects.

2.6.2 Lifting principles and lifting stages

1. Preparation: Before lifting or carrying, plan out your lift. Think about:

- ✓ How heavy/awkward is the load? Should I use mechanical means (e.g. a hand truck) or another person to help me with this lift? Is it possible to break the load into smaller parts?
- ✓ Where am I going with the load? Is the path clear of obstructions, slippery areas, overhangs, stairs, and other uneven surfaces? Are there closed doors that need to be opened?

- ✓ Are there adequate handholds on the load? Do I need gloves or other personal protective equipment? Can I place the load in a container with better handholds? Should another person help me with the load?

2. Lifting: Get as close to the load as possible. Try to keep your elbows and arms close to your body. Keep your back straight during the lift by tightening the stomach muscles, bending at the knees, keeping the load close and centered in front of you, and looking up and ahead. Get a good handhold and do not twist while lifting. Do not jerk; use a smooth motion while lifting. If the load is too heavy to allow this, find someone to help you with the lift.

3. Carrying: Do not twist or turn the body; instead, move your feet to turn. Your hips, shoulders, toes, and knees should stay facing the same direction. Keep the load as close to your body as possible with your elbows close to your sides. If you feel fatigued, set the load down and rest for a few minutes. Don't let yourself get so fatigued that you cannot perform proper setting down and lifting technique for your rest.

4. Setting down: Set the load down in the same way you picked it up, but in the reverse order. Bend at the knees, not the hips. Keep your head up, your stomach muscles tight, and do not twist your body. Keep the load as close to the body as possible. Wait until the load is secure to release your handhold.

Important things to remember

- ✓ Use mechanical means (e.g. hand trucks, pushcarts, etc.) when possible for heavier or awkward loads. Remember to obtain training and authorization before using a forklift.
- ✓ It is easier and safer to push than to pull.
- ✓ Keep loads as close to the body as possible and do not twist while lifting, carrying, or setting down a load. Nose, shoulders, hips, and toes should all be facing the same direction.

Minimize reaching

- ✓ As a general rule, bend at the knees, not the hips.

- ✓ Get help when needed. Do not lift or carry things you don't feel comfortable with, no matter how light the load.
- ✓ Plan ahead for all parts of the lift: lifting, carrying, and setting down.
- ✓ Try to utilize proper handholds while lifting. If an item does not have a good handhold, think of ways to remedy this, such as placing the item in a container with good handholds, creating a safe and proper handhold with an appropriate tool, etc.
- ✓ Use personal protective equipment where needed, such as gloves with good grip and steel-toed boots where appropriate.
- ✓ Implement rest breaks and job rotation for frequent and/or heavy lifting.
- ✓ Place items to be lifted within the "power zone". The power zone is close to the body, between the mid-thigh and mid-chest of the person doing the lifting. This is the area where the arms and back can lift the most with the least amount of effort.

Weight of objects: Heavier loads place greater stress on muscles, discs, and vertebrae. Where possible, use mechanical means such as forklifts or hand trucks to transport heavy items. Ramps can be helpful in moving heavy items from one level to another. Materials that must be manually lifted should be placed at "power zone" height: about mid-thigh to mid-chest of the person doing the lifting. Ensure that proper lifting principles (see above) are used.

Try to order supplies in smaller quantities and/or break loads up into smaller, lighter quantities where possible. Is the container itself heavy? Perhaps a smaller or lighter container is available. Limit weight you lift to no more than 50 pounds. When lifting loads heavier than 50 pounds, use two or more people to lift the load.

Awkward postures: Bending while lifting causes several problems for the back. It adds the weight of the upper body to the weight of the object being lifted. Bending and/or reaching moves the load away from the body and allows leverage to significantly increase the effective load on the back, leading to stress on the lower spine and muscle fatigue. Carrying loads on one shoulder, under an arm, or in one hand creates uneven pressure on the spine. Move items close to the body and use the legs when lifting from a low location to minimize bending and reaching.

Ensure proper housekeeping is taking place so that you may get as close to your lifting loads as possible. Store and place materials that need to be manually lifted at the "power zone": mid-thigh to mid-chest height. This can be accomplished by placing objects on shelves, tables, racks, or stacked pallets; or by using ladders or aerial lifts where necessary to elevate you and minimize overhead reaching.

Roll-out decks in truck beds can be utilized to bring materials closer to the employee and eliminate the need to crawl into the back of a truck. Ensure that proper lifting principles (see above) are used, including avoiding twisting and holding the load close to the body.

High-frequency and long-duration lifting: Holding items for long periods, even if loads are light, increases the risk of back and shoulder injury since muscles can be starved of nutrients and waste products can build up. Repeatedly exerting, such as when pulling wire, can fatigue muscles by limiting recuperation times. Inadequate rest periods do not allow the body time to recover.

Plan ahead when beginning works that will require high-frequency and long-duration lifting. This way, the work can be organized in such a way so as to minimize the time workers spend holding loads.

Adequate rest breaks can be planned in, as well as job rotation between employees. This includes both rotating tasks (employees trade off on differing tasks) and team work (two or more employees work together doing different parts of the same activity to reduce strain).

Planning can also include the pre-assembly of work items to minimize the time spent handling them during the actual work.

Inadequate handholds: Inadequate handholds, such as boxes without handles or oddly-shaped loads, make lifting more difficult, move the load away from the body, lower lift heights, and increase the risk of contact stress and of dropping the load.

Where possible, utilize handholds such as handles, slots, or holes that provide enough room for gloved hands. Try to use materials that are packaged with proper handholds (your supplier may be able to provide different containers), or move materials into

containers with good handholds. Wear protective equipment to avoid finger injuries and contact stress. Ensure that gloves fit properly and provide adequate grip. Suction devices are helpful in lifting junction boxes and other materials with smooth, flat surfaces. Other tools may be available that can create temporary handles.

Environmental factors: Be aware of extreme temperatures that can affect lifting and material handling. For example, muscle flexibility decreases in cold temperatures, and hot temperatures can lead to heat stress. Low visibility or poor lighting increases the chance of trips and falls.

Do what you can to adjust work schedules to minimize exposure to extreme temperatures or low visibility. Wear appropriate clothing for the temperature in which you will be working.
Drink lots of water to avoid dehydration in excessive heat. Provide proper lighting for areas with low light and try to perform work during daylight hours when possible.

2.6.2 General techniques to lift safely

Everyone lifts, holds, carries, pushes and pulls on a daily basis whether it is during leisure activities or as a part of paid work. Manual material handling involves lifting light, heavy and awkward objects. Safe lifting is a critical aspect of daily activities and should be the focus of any manual material handling. Before you lift, remember the following:

- ✓ Wear supportive shoes;
- ✓ Use lift assists (hand dollies, carts, lift tables, forklifts);
- ✓ Carry all movements out horizontally (e.g., push and pull rather than lift and lower);
- ✓ Always use your body weight and not your feet when pushing;
- ✓ Try to have most workplace deliveries placed at hip height;
- ✓ Always keep objects in the comfort zone (between hip and shoulder height);
- ✓ Keep all loads close to and in front of the body.
- ✓ Keep the back aligned while lifting.
- ✓ Maintain the center of balance.
- ✓ Let the legs do the actual lifting and

- ✓ Reduce the size of the material to keep it light, compact and safe to grasp.

There is a 10:1 ratio for every lift performed. For example, if an object is 10 pounds, it takes your back 100 pounds of back pressure to pick up the object.

Plan the lift:

- ✓ Size up the load, its weight, shape and position;
- ✓ Determine if the load is too large, too heavy or too awkward to move alone;
- ✓ Get help from a coworker or use a mechanical aid device to help with the lift when necessary;
- ✓ Decide on the route to take;
- ✓ Check for any problems or obstacles such as slippery or cluttered floors;
- ✓ Investigate the location where the load will be placed in order to anticipate any difficulties; and
- ✓ Always exercise or warm-up the back prior to lifting.



Figure 2.2: Plan the lift and squat

a) Squat lifting

Squat lifting should be done for a majority of all lifts. Squat lifting should be performed as follows:

- Stand as close to the load as possible;
- Move your feet shoulder width apart;
- Tighten your stomach muscles so you can tuck your pelvis;
- Bend at the knees, keeping your back straight and stomach tucked;
- Get a good firm grip on the load;
- Hug the load close to the center of your body;
- Lift smoothly with your legs gradually straightening the knees and hips into a standing position; and
- Avoid twisting your body as you lift.

Carrying the load

- Keep the load close to the center of your body to take full advantage of the mechanical leverage of your body;
- Do not change your grip on the load unless it is weight supported;
- Avoid twisting your body without pivoting your feet at the same time;
- If you must change direction, move your feet in that direction instead of twisting your trunk in that direction;
- Make sure you can see over the load; and
- Move carefully toward your destination.

Unloading objects

Unloading objects should be done the same way as lifting objects, but in the reverse order as follows:

- Slowly bend your knees to lower the load.
- Keep your back straight and the weight close to the center of your body.
- Allow enough room for fingers and toes when the load is set down.

Place the load on a bench or table by resting it on the edge and pushing it forward with your arms and body and secure the load to ensure that it will not fall, tip over, roll or block someone's way.

One-arm loads

One-arm loads are used when carrying items such as pails or buckets.

Lifting and carrying one-arm loads should be performed as follows:

- ✓ Bend the knees and at the waist keeping your back straight.
- ✓ Reach for the load;
- ✓ Grasp the handle of the load firmly;
- ✓ Lift with your legs not your shoulders and upper back; and
- ✓ Keep your shoulders level while switching hands regularly to reduce overexertion on one side of the body while carrying the load.

Team lifts

Team lifts are used when objects are too heavy, too large or too awkward for one person to lift.

Team lifts should be performed as follows:

- ✓ Work with someone of similar build and height, if possible;
- ✓ Choose one person to direct the lift (e.g., "lift on the count of three");
- ✓ Lift with your legs and raise the load to the desired level at the same time;
- ✓ Always keeps the load at the same level while carrying;
- ✓ Move smoothly and in unison and Set the load down together

b) Overhead lifts

Overhead lifts should be conducted as follows:

- ✓ When lifting or lowering objects from above the shoulders, lighten the load whenever possible;
- ✓ Stand on something sturdy such as a step stool or platform to decrease the vertical distance; and
- ✓ When you are lowering objects from above the shoulders, slide the load close to your body, grasp the object firmly, slide it down your body and proceed with your move.

Mechanical aids

Special lifting equipment such as hand trucks, carts, dollies, forklifts, hoists and wheelbarrows can help move loads when they are too heavy, awkward or a co-worker is not available.

Although mechanical aids are used, safe lifting procedures should still be followed by maintaining the natural curvature of the back, using the legs for any lifting that is encountered and avoids twisting the back.



Figure 2.3. Manual lifting equipment and mechanical lifting aids

Self-Check 2	Written test

Name…… ID…… Date…….

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Part I: Say true or false

1. Food stock rotation consists in using products with an earlier use-by-date first and moving products with a later sell-by date to the back of the shelf.
2. Stock rotation applies to some food types but is particularly important for high-risk food.
3. Stock rotation is the process of organizing inventory to mitigate stock loss caused by expiration or obsolescence.

4. Materials brought into stores are lately assigned system code and file names for easy identification.
5. A store code can be anything from the name of a place to a random number, as long as it stays the same to refer to that location**.**
6. Stock Keeping Unit is generally more memorable than a barcode

7. A retail display is anything in a store that houses or promotes your product.
8. Shelving displays are any type of display that exists on a traditional store shelf.
9. The major causes of obsolete and surplus stocks are the over estimation of requirements, changes in product design, standardization, and bulk purchases.
10. The method of storage will depend on the size, shape, type and quantity of the item.
11. Proper stores layout permits easy access to materials, better space utilization and reduced need for handling within the stores.

12. Safety and Wellbeing policy reflects our commitment to a safety culture that extends beyond the once traditional view of physical injuries.
13. occupational health is “The promotion and maintenance of the lowesest degree of physical, mental social well- being of workers in all occupation”

14. Unloading objects should be done the same way as lifting objects.
15. Team lifts are used when objects are too heavy, too large or too awkward for one person to lift.
16. Plan ahead when beginning works that will require high-frequency and long-duration lifting.

Part II: Choose the correct answer

1. The benefits of FIFO include.
   a. Reduce spoiled and expired products
   b. Keep current inventory value
   c. Minimize the impact of inflation
   d. ALL

2. Using FIFO procedures in your warehouse can help suppliers, retailers and ecommerce businesses keep current with inventory value. It refers --------**.**
   A. Reduce spoiled and expired products
   B. Keep current inventory value
   C. Minimize the impact of inflation
   D. all

3. Product codes must not start with:
   A. 1
   B. 0
   C. 4
   D. 9

4. The maximum and minimum character of Stock Keeping Unit:
   A. 4 and 3
   B. 12 and 4
   C. 8 an 4
   D. 12 and 8

5. _____is any store display that draws attention to your product.
   A. End Cap Displays
   B. Standalone POP Display

C. Retail Shelving Display
D. All

6. The following measures are suggested to reduce obsolescence of stock.
   A. Standardization must be implemented when stocks are low
   B. Changes in design and production schedules should be made when stocks are at a minimum level.
   C. Discounts should be negotiated only if the additional items are absolutely essential.
   D. ALL
7. Some of the rules for developing proper stores layout are?
   A. Space utilization
   B. First in-first out principle
   C. Materials should be properly labelled
   D. All
8. The most important challenges for occupational health for the future will be:
   A. New chemical substances and physical energies
   B. Aging working populations
   C. Health hazards associated with new biotechnologies
   D. All
9. _____is what provides workers with minimum standards of health and safety in the workplace?
   A. Rule of law
   B. Government legislation
   C. National standard
   D. All
10. Which one are Lifting principles and lifting stages?
   A. Preparation
   B. Lifting
   C. Carrying
   D. Setting Down
   E.ALL

Part III: Short Answer Questions

1. Define the advantage of store display to promote sales?
2. List the steps of displays merchandise or stock?
3. Define steps should be taken to identify and dispose of useless stocks.
4. How to Placing excess stock in storage?
5. Write occupational health and safety components?

Operation Sheet- 2

2.1 **Procedure of squat lifting**

a. Tools and equipment

- ✓ Safety glass
- ✓ Hard hat
- ✓ Gloves
- ✓ Boots

b. Procedure:

i. Stand as close to the load as possible
ii. Move your feet shoulder width apart
iii. Tighten your stomach muscles so you can tuck your pelvis
iv. Bend at the knees, keeping your back straight and stomach tucked
v. Get a good firm grip on the load
vi. Hug the load close to the center of your body
vii. Lift smoothly with your legs gradually straightening the knees and hips into a standing position and
viii. Avoid twisting your body as you lift.

2.2. Procedure of carrying the load

a) Tools and equipment

- ✓ Safety glass
- ✓ Hard hat
- ✓ Gloves
- ✓ Boots

b) Procedure:

i. Keep the load close to the center of your body to take full advantage of the mechanical leverage of your body
ii. Do not change your grip on the load unless it is weight supported
iii. Avoid twisting your body without pivoting your feet at the same time

iv. If you must change direction, move your feet in that direction instead of twisting your trunk in that direction;

v. Move carefully toward your destination.

Procedure of unloading objects

a) Tools and equipment

- ✓ Safety glass
- ✓ Hard hat
- ✓ Gloves
- ✓ Boots

b) Procedure

i. Slowly bend your knees to lower the load.

ii. Keep your back straight and the weight close to the center of your body.

iii. Allow enough room for fingers and toes when the load is set down.

iv. Place the load on a bench or table by resting it on the edge and pushing it forward with your arms and body and secure the load to ensure that it will not fall, tip over, roll or block someone's way

2.3. Procedure of one-arm loads

a) Tools and equipment

- ✓ Safety glass
- ✓ Hard hat
- ✓ Gloves
- ✓ Boots

b) Procedure:

i. Bend the knees and at the waist keeping your back straight.

ii. Reach for the load;

iii. Grasp the handle of the load firmly;

iv. Lift with your legs not your shoulders and upper back; and

v. Keep your shoulders level while switching hands regularly to reduce overexertion on one side of the body while carrying the load.

2.4. Procedure of overhead lifts

a) Tools and equipment

- ✓ Safety glass
- ✓ Hard hat
- ✓ Gloves
- ✓ Boots

b) Procedure:

Overhead lifts should be conducted as follows:

i. When lifting or lowering objects from above the shoulders, lighten the load whenever possible
ii. Stand on something sturdy such as a step stool or platform to decrease the vertical distance
iii. When you are lowering objects from above the shoulders, slide the load close to your body, grasp the object firmly, slide it down your body and proceed with your move.

Lap Test 2	Performance Test

Name……. ID……..

Date…….

Time started: _____ Time finished: _____

Instructions: Given necessary templates, tools and materials you are required to perform the following tasks within **2** hour. The project is expected from each student to do it.

a) Squat lifting.
b) Carrying the load.
c) Unloading objects.
d) One-arm loads.
e) Overhead lifts.

LG #25	LO#3- Assess quality of service delivered

Instruction sheet

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Checking quality standards and specifications
- Checking quality parameters services delivered.
- Evaluating service delivered using the appropriate evaluation quality.
- Organization policies and procedures.
- Identifying causes of faults and taking corrective actions

This guide will also assist you to attain the learning outcomes stated in the cover page. Specifically, upon completion of this learning guide, you will be able to:

- Checking quality standards and specifications
- Checking quality parameters services delivered.
- Evaluating service delivered using the appropriate evaluation quality.
- Organization policies and procedures.
- Identifying causes of faults and taking corrective actions

Learning Instructions:

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below.
3. Read the information written in the information Sheets
4. Accomplish the Self-checks
5. Perform Operation Sheets
6. Do the “LAP test”

Information Sheet 3

3.1 Checking quality standards and specifications

Quality standards are defined as documents that provide requirements, specifications, guidelines, or characteristics that can be used consistently to ensure that materials, products, processes, and services are fit for their purpose.

Standards provide organizations with the shared vision, understanding, procedures, and vocabulary needed to meet the expectations of their stakeholders. Because standards present precise descriptions and terminology, they offer an objective and authoritative basis for organizations and consumers around the world to communicate and conduct business.



Figure 3.1. Principles of quality standards

Who uses quality standards: Organizations turn to standards for guidelines, definitions, and procedures that help them achieve objectives such as:

- Satisfying their customers' quality requirements
- Ensuring their products and services are safe
- Complying with regulations
- Meeting environmental objectives
- Protecting products against climatic or other adverse conditions
- Ensuring that internal processes are defined and controlled

Use of quality standards is voluntary, but may be expected by certain groups of stakeholders. Additionally, some organizations or government agencies may require suppliers and partners to use a specific standard as a condition of doing business.

Quality specifications are detailed requirements that define the quality of a product, service or process. Quality includes tangible elements such as measurements and intangible elements such as smell and taste. The following are illustrative examples of quality specifications. Precise definitions that are used to sort food into quality grades. For example, apples might be sorted according to size, ripeness, color, symmetry and condition to offer a premium and non-premium grade.

Product specification means those product, process, Manufacturing and labeling specifications used by Seller in the Manufacture of Products in compliance with all applicable Regulatory Requirements, including Product formula and materials required for the Manufacture of the Products that are to be manufactured, purchased and supplied under this Agreement, as such are in effect as of the Effective Date, as such specifications may be amended from time to time as required by any Regulatory Requirements or by the mutual written agreement of the Parties.

Quality control (QC) is a procedure or set of procedures intended to ensure that a manufactured product or performed service adheres to a defined set of quality criteria or meets the requirements of the client or customer. QC is similar to, but not identical with, quality assurance

(QA). While QA refers to the confirmation that specified requirements have been met by a product or service, QC refers to the actual inspection of these elements.

When measuring success, companies use internal tools to assess factors such as the quality, reliability and efficiency of their operations and products. Measuring the quality of operations and products can help companies understand how to further improve. You may benefit from learning more about these measurement processes if you plan to evaluate company success.

It's important for companies to measure the quality of their products, services and processes, as it can demonstrate where the company performs well and where the company might benefit from improvement. Companies might also examine the quality of elements such as safety, performance or efficiency. Quality metrics can also sometimes be indicative of the overall health of the company or of customer satisfaction.Consider this list of steps you can use to measure quality:

1. Decide what factor to measure: Identify a specific feature of a company, department or product and establish a method with which to measure or track it. For example, you may choose to measure the quality of a finished product or customer service department responses. A quality metric for these components might include the number of positive or negative customer reviews, or the number of product returns against the number of products sold. Consider measuring these components individually, then measuring the final results against any other components measured within the company. This may help a company estimate its overall health and quality of services.

Before determining what to measure for quality, it may be beneficial to first decide on a company-wide definition of quality. This may help ensure that all departments within the company have a set standard to measure against and can work towards it while performing their duties. Company-wide targets or objectives may help maintain established quality standards in the future.

2. Determine the method of measurement: Once a you agree on a definition of quality, you can determine the metrics by which to measure and establish a method for measurement. Different departments often use different methods to measure quality. For example, a software

development team might measure quality by assessing the number of bugs in a program while a manufacturing facility might measure quality by evaluating processing and delivery speeds.

Here are some metrics to consider using to assess team efficiency and the quality of company products or processes:

Reliability

Reliability refers to the stability of a product or process, and the ability of those elements to perform without errors. You can measure reliability by:

- Identifying system bugs, product defects or team issues during production
- Analyzing equipment or product malfunctions
- Testing products under various stressful conditions
- Asking for and implementing customer feedback
- Evaluating customer complaints

Efficiency and performance

Efficiency and performance refer to the speed and accuracy of employee, process and product operations. Some methods for measuring efficiency include:

- Creating fair performance rating systems for employees
- Reviewing these performance ratings and analyzing needs for additional training
- Testing product performance capacities
- Measuring units processed per day/week
- Calculating equipment capacities and performance

Safety and security: Safety refers to employees' and consumers' abilities to use products or services without harm. Security involves safe access to company computer systems, networks and devices without the risk of cyber-attacks. It also involves the protection of private or sensitive customer information within the company. Methods for measuring safety and security include:

- Reviewing federal safety standards
- Evaluating the safety of materials in products
- Regularly testing all IT infrastructures
- Scanning software to identify vulnerabilities
- Identifying any previous cyber-attacks or data breaches

Usability

Usability refers to the quality of a person's experience while using a product. You can measure usability through:

- Analysis of competitors and their products
- Rate of customer satisfaction
- Analysis of user tests before product release
- Assessment of accessibility, such as the inclusion of larger buttons or text-to-voice functionality

3. Establish quality assurance procedures: Some companies may have quality assurance departments that can help evaluate quality measurements and implement solutions in areas a company might improve. Smaller companies may not have this type of department, but there are a few procedures you can follow to evaluate and improve quality. These include:

1. Pick a responsible individual or team to oversee quality measurement activities.
2. Establish clear responsibilities, directives and resources to complete these tasks.
3. Execute analysis of quality metrics and begin improving processes or other aspects of the company.

It may also be beneficial to measure the quality of the proposed solutions at a later time to determine if they meet user and company standards. This ensures that the quality assurance team fulfills its duties. You might do this by running user tests on products, temporarily implementing small changes to department policies or meeting with specific company supervisors and teams.

4. Create and standardize policies for future quality measurement activities

It may save time and resources if companies establish standard procedures for measuring quality in the future. Companies can also standardize these procedures so they can apply to all areas of the company. This may include:

- Performing and overseeing regular quality measurement activities in all departments or specific ongoing operations
- Formulating a set of quality measurement tools, such as computer programs to assist in data analysis
- Ensuring policy compliance
- Training staff to complete quality measurement tasks

5. Revisit quality standards periodically

It may be beneficial to periodically revisit established quality standards, as some processes, departments or products may change over time. Revisiting and possibly revising these quality standards may ensure that the company continues to operate efficiently and produces valuable goods or services. Changes in the market can also be cause for revision. If you implement any changes to quality assessment procedures, be sure to notify the rest of the company so everyone stays informed.

3.2 Checking quality parameters services delivered.

Services are mostly intangibles and difficult to quantify. Measurement of Quality is therefore much more difficult in service companies. Service companies or organizations or service departments of manufacturers (e.g. purchase, marketing, administration, security, labs, etc.) usually measure their service quality in terms of service dimensions. These are commonly known as *Serv Qual* (Ref: Parasuraman) and are as follows:

1. **Tangibles**: Appearance of physical facilities, equipment, personnel, printed and visual materials, physical infrastructure of a classroom in a school, shop, waiting room, bank, etc.
2. **Reliability**: Ability to perform promised service
3. **Responsiveness:** Willingness to help customers to provide prompt service, response time to a query/complaint, helping attitude of staff, face gestures in dealing, work efficiency, etc.
4. **Competence:** Possession of required skill and knowledge to perform service, work related knowledge, skills, experience and capabilities in front line staff
5. **Courtesy**: Politeness, respect, consideration and friendliness of contact personnel, friendliness in all types of dealings with customers
6. **Credibility**: Trustworthiness, believability, honesty of the service provider, % of service given as promised, truthful and correct information given to customers, etc.
7. **Access**: Approachability and ease of contact. How comfortably the customers can access by telephone, office, net, etc.
8. **Communication**: Listening to customers and acknowledging their comments, keeping customers informed, passing complete information that customers want at various interactions during service delivery

9. **Empathy**: Making the effort to know customers and their needs, understanding of the customer needs by company staff on individual basis

The above dimensions will provide a useful base to companies on what to measure in service departments or companies. Every service provider has to interpret these broad dimensions into their specific service parameters and then pick the most appropriate ones related to their specific services and then develop a procedure/methodology to measure against its competitors. This will provide them an objective comparison of one's company with its competitor(s). One of the common weaknesses of companies is wrongly/incompletely classifying and measuring the service parameters for their services.

Quality Parameters:

ASA or Average Speed of Answer: This metrics tracks the amount of time your agent takes to answer an inbound call. This is a customer-centric metric and helps in influencing customer satisfaction.

FCR or First Call Resolution: It tracks if your agents can resolve a customer query in the first interaction or do they need to do a follow-up.

AHT or Average Handle Time: This metrics records the time an agent takes to complete the entire transaction. It starts from the moment the agent is connected with the customer on the phone all the way until the agents finish the After Call Work.

CSAT or Customer Satisfaction Score: It measures the degree customers are satisfied with the service provided by a Customer Service.

NPS® or Net Promoter Score®: With NPS® you can examine the satisfaction and loyalty of your customer base. You can check if your customers are likely to recommend your service to their acquaintances or not.

CES or Customer Effort Score: This Customer Experience metric is different from usual metrics. With this metric, you can ask the customers how much effort the customer had to put in

their journey with the company. The aim is to understand the customer's effort and reduce it in order to increase customer happiness and satisfaction.

It is important to remember that to improve the Quality of the Call Center performance you must define the purpose of the QA program first. Once you have established what your goal is you can identify which Quality Parameters will align with the goal. This way you can design your action plan and track and monitor those QA metrics.

3.3 Evaluating service delivered using the appropriate evaluation quality

Measuring service quality allows you to spot areas for improvement, assess and compare the performance of team members, set clear targets to aim for, and improve your customer satisfaction. Here are nine practical techniques and metrics for measuring your service quality.

- SERVQUAL
- Post-service ratings
- Follow-up surveys
- In-app surveys
- Mystery shopping
- Documentation analysis
- Customer effort score (CES)
- First contact resolution ratio
- Metrics analysis

1. SERVQUAL

This is the most common method for measuring the subjective elements of service quality. Through a survey, you ask your customers to rate the delivered service compared to their expectations.

Its questions cover what SERVQUAL claims are the five elements of service quality: RATER.

Reliability. The ability to deliver the promised service in a consistent and accurate manner.

Assurance. The knowledge level and politeness of the employees and to what extent they create trust and confidence.

Tangibles. The appearance of e.g. the building, website, equipment and employees.

Empathy. To what extent the employees care and give individual attention.

Responsiveness. How willing the employees are to offer a speedy service.

2. Post-service ratings

This is the practice of asking customers to rate the service right after it's been delivered. This is our favorite approach, because the memory of the service is still fresh and undiluted.

With our live chat solution, for example, you can set the chat window to display a service rating box once it closes. The customers make their rating, perhaps share some explanatory feedback, and close the chat.

Something similar is done with helpdesk systems like Help Scout, where you can rate the service response from your email inbox.

It's also done in phone support, although here the experience is a bit trickier. It requires the service rep to ask whether you're satisfied with their service performance, or you're asked to stay on the line to complete an automatic survey. The former distorts the results as one tends to be polite/agreeable; the latter is simply annoying.

As a general rule: The easier you make it for your customers to leave instant feedback, the better your results will be. Difficulty skews your results to only include your most happy and annoyed customers. Effortlessness, like the one-click rating after a chat support session, ensures that you also include the majority in between.

Different scales can be used for the post service rating. Many make use of a number rating from 1–10. There's a possible issue here, however, as cultures differ in how they rate their experiences.

People from individualistic cultures, for example, tend to choose the extreme sides of the scale much more often than those from collectivistic cultures. In line with stereotypes, Americans are more likely to rate a service as "amazing" or "terrible," while the Japanese will hardly ever go beyond "fine" or "not so good." It's important to be aware of when you have an international audience.

Simpler scales are more robust to cultural differences and more suited for capturing service quality. Customers don't generally make a sophisticated assessment of service quality.

"Was it a 7 or an 8...? Well... I did get my answer quickly... On the other hand, the service agent did sound a bit hurried…" This type of judgement is unrealistic. Customers are more inclined to rate it as "Fine," "Great!" or "Crap!"

That's why at User like we make use of a 5-star system in our live chat rating, why Help Scout makes use of three options (great – okay – not good), and why the US government makes use of four smileys (angry – disappointed – fine – great). Easy-peasy.

3. Follow-up surveys

With this method, you ask your customers to rate your service quality through an email survey – for example via Google Forms. It has advantages and disadvantages compared to the post-service rating.

One advantage is that it gives your customer the time and space for more detailed responses. You could send a SERVQUAL type of survey, with multiple questions instead of one. That'd be terribly annoying in a post-service rating.

It also provides a more holistic overview of your service. Instead of a case-by-case assessment, the follow-up survey measures your customers' overall opinion of your service.

It's also a useful technique if you didn't have the post service rating in place yet and want a quick overview of the state of your service quality. You could send out a survey to your entire customer base, for example.

But there are downsides as well. Such as the fact that the average person's inbox already looks more like a jungle than a French garden. Nobody's waiting for more emails – especially those that don't promise any benefit for the recipient.

With a follow-up survey, the service experience will also be less fresh in mind. Your customers might have forgotten about the experience entirely, or they could confuse it with another experience.

And finally, since such a follow-up survey constitutes more effort, you will mostly receive responses from your most positive and negative customers – filtering out everyone in between.

Here is a good example of a follow-up survey.

4. In-app surveys

With an in-app survey, the questions are asked while the visitor is on the website or in the app, instead of after the service or via email. It can be one simple question – e.g. "How would you rate our service?" – Or it could be a couple of questions.

Convenience is the main advantage. The downside is that it's not so targeted. People are likely to respond based on their entire experience, rather than specifically on the basis of your service quality.

SurveyMonkey offers some great tools for implementing something like this on your website. Also check out Hotjar's guide on website feedback .

5. Mystery shopping

This is a popular technique used by retail stores, hotels, and restaurants, but works for any type of service, also digital. It consists of hiring an "undercover customer" to test your service quality – or putting on a fake moustache and doing it yourself, of course.

The undercover agent then assesses the service based on a number of criteria, for example those provided by SERVQUAL. This offers more insights than simply observing how your employees work. Which will probably be outstanding — as long as their boss is around.

6. Documentation analysis

With this qualitative approach you read through/listen to your written/recorded service records. Those doing this quality assurance then check whether the support agents took the right actions

or not. They can then process this into constructive feedback, or follow up with the customer for damage control if necessary.

You'll definitely want to go through the transcripts of low-rated service deliveries, but it can also be interesting to read through the documentation of service agents that always rank high. What are they doing better than the rest? It can be small things that separate a good from a great service delivery, such as the proper use of emoji in chat support.

The effort involved with doing this type of analysis largely depends on the customer channel. Live chat and email support offer instant documentation, and especially with the former it's easy to pick out the outliers.

7. Customer effort score (CES)

This metric was proposed in an influential Harvard Business Review article. In it, the authors argue that instead of delighting our customers, we should make it as easy as possible for them to have their problems solved. That's what they found to have the biggest positive impact on the customer experience, and what they propose measuring.

Don't ask: *"How satisfied are you with this service?"* Its answer could be distorted by many factors, such as politeness. Ask: *"How much effort did it take you to have your question(s) answered?"*

The lower the CES score, the better. CEB found that 96% of the customers with a high effort score were less loyal in the future, compared to only 9% of those with low effort scores.

8. First contact resolution ratio

First contact resolution takes place when a customer reaches out to support with a question or issue, and they receive a resolution in that first session. So no follow-up emails, call-backs, etc.

It's a metric worth highlighting due to its direct positive effect on customer satisfaction. In a Touchpoint research by CX Act, they found that *"...customers who receive a first contact resolution are nearly twice as likely to buy again from a brand and four times more likely to spread positive word of mouth about it."*

To calculate this metric, divide the number of issues that were resolved through a single response by the number that required more responses.

Here, also, the customer channel has a big influence. Email is a notoriously bad channel for first contact resolution, because it lacks the opportunity to have a quick back-and-forth that is often necessary to clarify the customer's issue. For this, you need live channels like phone and website chat .

It's mostly for this reason that at Userlike we've implemented an option to escalate from a customer chat to a call . Website chat is the best channel to start a conversation due to its low-barrier nature. But when the topic becomes complex, or you notice that you have a warm lead, you can easily send an invitation for a call. If the customer accepts, the call opens directly in their browser.

9. Leading metrics analysis

The first contact resolution ratio is an example of a metrics analysis approach to measuring service quality.

SERVQUAL, CES and the different types of above mentioned surveys focus on the *outcome* or the goal, i.e. the subjective experience of the customer. But there is also great value in focusing on the *inputs,* i.e. the elements that make for a quality service delivery.

In tracking terms, these input indicators are called *leading metrics,* while the outcome indicators are *lagging metrics* . Measuring the outcome of your service delivery is necessary to know where you stand, but input metrics can tell you where to go.

The below metrics are great as a basis for setting the targets of your service team. Customer satisfaction is elusive and dependent on many factors outside of one's control. The following input metrics focus your team on the areas they can control.

First response time: This metric tracks how quickly a customer receives a response on their inquiry. This doesn’t mean their issues are solved, but it’s the first sign of life – notifying them that they’ve been heard.

Response time: This is the total average of time between responses.

Replies per ticket: This shows how many replies your service team needs on average to close a ticket. It's a measure of efficiency and customer effort.

Backlog inflow/outflow: This is the number of cases submitted compared to the number of cases closed. A growing number indicates that you'll have to expand your service team.

Customer success ratio: Good service doesn't mean your customers always find what they want. But keeping track of the number who found what they were looking for versus those that didn't can show whether your customers have the right idea about your offerings.

"Handovers" per issue: This tracks how many different service reps are involved per issue. Especially in phone support, where repeating the issue is necessary, customers hate handovers. Harvard Business Review identified it as one of the four most common service complaints.

Things gone wrong: The number of complaints/failures per customer inquiry. It helps you identify products, departments or service agents that need some "fixing."

Instant service/queueing ratio: Nobody likes to wait. Instant service is the best service. This metric keeps track of the ratio of customers that were served instantly versus those that had to wait. The higher the ratio, the better your service.

Average queueing waiting time: The average time that queued customers have to wait to be served.

Queueing hang-ups: How many customers quit the queueing process. These count as lost service opportunities.

Problem resolution time: The average time before an issue is resolved.

Minutes spent per call: This can give you insight on who are your most efficient operators.

Some of these measures are also financial, such as the minutes spent per call and number of handovers. You can use them to calculate your costs per service contact. Winning the award for the world's best service won't get you anywhere if it eats up all your profits.

Most service tools keep track of such metrics automatically. Within Userlike , we offer analytical Dashboards that show the most important KPIs for chat support .

One final word of caution. Measurements make for powerful incentives. This can be a great thing, when it points your team in the right direction. But there is also a danger of the measurement becoming the goal, instead of a reflection of the goal.

As customers, we've all gone through service experiences in which the agents were over-incentivized by efficiency metrics, seemingly eager to close the ticket as soon as possible.

This is obviously a losing strategy, as it leads to more questions and effort down the river. To get it right, be careful with what you measure, and balance output goals (i.e. customer satisfaction) with input goals (i.e. first response time).

3.4 Organization policies and procedures

Policies and procedures go hand-in-hand but are not interchangeable. A **policy** is a set of general guidelines that outline the organization's plan for tackling an issue. Policies communicate the connection between the organization's vision and values and its day-to-day operations. A **procedure** explains a specific action plan for carrying out a policy. Procedures tells employees how to deal with a situation and when.

Using policies and procedures together gives employees a well-rounded view of their workplace. They know the type of culture that the organization is striving for, what behavior is expected of them and how to achieve both of these.

3.4.1 The Importance of Policies and Procedures

Regardless of your organization's size, developing formal policies and procedures can make it run much more smoothly and efficiently. They communicate the values and vision of the organization, ensuring employees understand exactly what is expected of them in certain situations.

Because both individual and team responsibilities are clearly documented, there is no need for trial-and-error or micromanaging. Upon reading the workplace policies and procedures, employees should clearly understand how to approach their jobs.

Formal policies and procedures save time and stress when handling HR issues. The absence of written policies results in unnecessary time and effort spent trying to agree on a course of action. With strict guidelines already in place, employees simply have to follow the procedures and managers just have to enforce the policies.

Implementing these documents also improves the way an organization looks from the outside. Formal policies and procedures help to ensure your company complies with relevant regulations. They also demonstrate that organizations are efficient, professional and stable. This can lead to stronger business relationships and a better public reputation.

When creating a policy or procedure for your workplace, start by reviewing the mission statement, vision and values. According to the New South Wales Government Industrial Relations, "a workplace policy should:

- set out the aim of the policy
- explain why the policy was developed
- list who the policy applies to
- set out what is acceptable or unacceptable behavior
- set out the consequences of not complying with the policy
- provide a date when the policy was developed or updated"

Once you implement your policies and procedures, the next step is to inform and train employees on them. You can't expect employees to follow guidelines if they aren't aware of them. Be sure to schedule regular refresher training sessions, too, to keep employees on track.

Policies and procedures should not be written once and left alone for decades. Reviewing these documents regularly and updating them when necessary is key to their success. In addition to an annual review, consider updating them when you:

- adopt new equipment, software, etc.
- see an increase in accidents or failures on-site
- experience increased customer complaints
- have a feeling of general confusion or increased staff questions regarding day-to-day operations
- see inconsistency in employee job performance
- feel increased stress levels across the office

3.5 Identifying causes of faults and taking corrective actions

Cause analysis and corrective actions are critical aspects of both ISO 9001 and ISO 17025 compliance, as well as numerous other certifications and accreditations.
The requirements for these processes are painted with a broad brush, allowing organizations to design their own strategy to track and implement changes. An organization offers its users the opportunity to automate these processes and build customized workflows to ensure that you cover all the bases, regardless of which method or methods your organization uses to administer and track your cause analysis and corrective actions.

To start off, there are benefits to both correction and corrective action. The difference is that a corrective action treats the cause of a nonconformity, while a correction often just treats the symptoms of a nonconformity. After you determine your cause in cause analysis, you must take comprehensive actions in order to eliminate the nonconformity. Corrections are individual actions to address individual issues.

It is important to note that the latest editions of both ISO 9001:2015 and ISO 17025:2017 moved away from the term “root cause analysis,” and now simply address “cause analysis” instead. This change reflects the idea that nonconformities rarely have one distinct cause, and limiting the analysis to one cause could limit the effectiveness of the correction and corrective actions.

Effective cause analysis is the key to determining actions that yield long-lasting results. This is why it is so important to perform effective cause analysis: so that the nonconformity does not recur or occur elsewhere in the organization’s management system or operations.

Corrective actions need to respond appropriately to the effects of the nonconformities encountered. If you’re making donuts, for example, and you discover that your current process is putting sprinkles on jelly donuts (clearly a nonconformity!), changing your jelly recipe is not an appropriate corrective action to remedy the situation. Once the corrective action has been taken, effectiveness of the action must be reviewed. If the effectiveness of the actions taken is not

evaluated, it cannot be determined that the cause was eliminated and the problem corrected. In other words, once you've corrected the process to add a sugar coating rather than sprinkles to your jelly donuts, you need to observe that the process is working before you can determine that the corrective action was successful.

Cause analysis is the determination of a potential problem's underlying cause or causes. It is the process of identifying all causes that have or may have resulted in an undesirable condition, situation, nonconformity or failure. It is an analytical technique used to determine the basic underlying reason that causes a variance, defect or risk.

Self-Check – 3	Written test

Name----------ID----------Date----------

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Part I: Say true or false

1. Use of quality standards is voluntary.
2. Quality specifications are detailed requirements that define the quality of a product, service or process.
3. Services are mostly intangibles and difficult to quantify.
4. SERVQUAL is the most common method for measuring the subjective elements of service quality.
5. Policies and procedures should be written once and left alone for decades.
6. A policy is a set of general guidelines that outline the organization's plan for tackling an issue.
7. Effective cause analysis is the key to determining actions that yield long-lasting results.
8. Cause analysis and corrective actions are critical aspects of both ISO 9001 and ISO 17025 compliance, as well as numerous other certifications and accreditations

Part II: Choose the correct answer

1. _____ are defined as documents that provide requirements, specifications, guidelines, or characteristics that can be used consistently to ensure that materials, products, processes, and services are fit for their purpose.
   A. Food safety standards
   B. Quality standards
   C. Process parameter
   D. Services requirements
2. Organizations turn to standards for guidelines, definitions, and procedures that help them achieve objectives such as:

A. Satisfying their customers' quality requirements
B. Ensuring their products and services are safe
C. Complying with regulations
D. All

3. _____ is ability to perform promised service.
   A. Tangibles
   B. Reliability
   C. Credibility
   D. Communication
4. Making the effort to know customers and their needs, understanding of the customer needs by company staff on individual basis:
   A. Empathy
   B. Competence
   C. Complying with regulations
   D. Responsiveness
5. _____ is the practice of asking customers to rate the service right after it's been delivered.
   A. Post-service ratings
   B. Follow-up surveys
   C. In-app surveys
   D. All
6. Organizations turn to standards for guidelines, definitions, and procedures that help them achieve objectives such as:
   A. Satisfying their customers' quality requirements
   B. Ensuring their products and services are safe
   C. Complying with regulations
   D. All
7. According to the New South Wales Government Industrial Relations, "a workplace policy should:
   A. set out the aim of the policy
   B. explain why the policy was developed

C. list who the policy applies to

D. All

8. _____ is the determination of a potential problem's underlying cause or causes.

A. Cause analysis

B. Follow-up surveys

C. In-app surveys

D. All

Part III: Short Answer Questions

1. Write the principles of quality standards?
2. Write the quality parameters?
3. Write the five elements of service quality?
4. Write the nine practical techniques and metrics for measuring your service quality?
5. Write the difference between policy and procedure?

LG #26 LO #4-Receive and process incoming goods

Instruction Sheet

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Recording basic information on the quality performance in accordance with organization procedures.
- Maintaining records of work quality according to the requirements of the organization.

This guide will also assist you to attain the learning outcomes stated in the cover page. Specifically, upon completion of this learning guide, you will be able to:

- Recording basic information on the quality performance in accordance with organization procedures.
- Maintaining records of work quality according to the requirements of the organization.

Learning Instructions:

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below.
3. Read the information written in the information Sheets
4. Accomplish the Self-checks
5. Perform Operation Sheets
6. Do the “LAP test”

Information Sheet 4

4.1 Recording basic information on the quality performance in accordance with organization procedures.

A **Quality Record** is the documented specific information of a quality management system that relates to the quality performance, procedures, and work instructions.

A record is any document - in any format (paper or electronic, and yes even video) - created or received by you or your department - that allows you to conduct business. The value of a record is determined by content, not by format. Records are the collected information produced by the laboratory in the process of performing and reporting a laboratory test. Characteristics of records are that they:

- Need to be easily retrieved or accessed;
- Contain information that is permanent, and does not require updating.

Recording information means the information added to a document at the time such document is recorded, including but not limited to, the date and time of receipt of such document for recording, the name and municipality of the recording officer, and the book and page of such document or other suitable indication of its location.

Some examples of records include: completed forms, charts, sample logs, patient records, quality control information, and patient reports. Information is the major product of the laboratory, so manage it carefully with a good system for the laboratory's documents and records.

Information is the major product of the laboratory, so manage it carefully with a good system for the laboratory's documents and records.

Importance of records

Remember that records are laboratory information, either written by hand or computer printed. They are permanent, and are not revised or modified. They should be complete, legible and carefully maintained, as they are used for many purposes, such as:

- ✓ Continuous monitoring—without access to all the data collected as a part of a quality system process, continuous monitoring cannot be accomplished;
- ✓ tracking of samples—well-kept records allow for tracking of samples throughout the entire testing process; this is essential for troubleshooting, looking for sources of error in testing, and investigating identified errors;
- ✓ evaluating problems—well-kept equipment records will allow for thorough evaluation of any problems that arise;
- ✓ Management—good records serve as a very important management tool.

Never change a record. If new information needs to be added to a record, it should be noted as an addition, with a date, and signature or initials. Many kinds of records are produced in a laboratory. Some examples include:

- ✓ Sample log book, registers;
- ✓ Laboratory workbooks/sheets;
- ✓ Instrument printouts –maintenance records
- ✓ Quality control data
- ✓ Eqa / pt records
- ✓ Patient test reports
- ✓ Personnel records
- ✓ Results of internal and external audits
- ✓ Continuous improvement projects
- ✓ Incident reports
- ✓ User surveys and customer feedback
- ✓ Critical communications: i.e. Letters from regulatory agencies, from government, or maybe from administrative offices within the healthcare system

Using a paper system: It is important to consider the following when using a paper system for records.

- ✓ Permanence—paper records must last for as long as needed. This should be ensured by binding pages together, or using a bound book (log register). Pages should be numbered for easy access, and permanent ink used.
- ✓ Accessibility—paper systems should be designed so that information can be easily retrieved whenever needed.
- ✓ Security—documents and records must be kept in a secure place. Security considerations include maintaining patient confidentiality. Care should be taken to keep documents safe from any environmental hazards such as spills. Consider how records can be protected in the event of fires, floods, or other possibilities.
- ✓ Traceability—it should be possible to trace a sample throughout all processes in the laboratory, and later to be able to see who collected the sample, who ran the test, and what the quality control results were for the test run including issuing of the report.

This is important in the event there are questions or problems about any reported laboratory result. All records should be signed, dated, and reviewed to ensure that this traceability throughout the laboratory has been maintained.

Using an electronic system: Electronic systems have essentially the same requirements as paper systems. However, the methods for meeting these requirements will be different when using computers. The following are factors to consider.

- ✓ Permanence—backup systems in case the main system fails are essential. Additionally, regular maintenance of the computer system will help to reduce system failures and loss of data.
- ✓ Security—it is sometimes more difficult to assure confidentiality with a computer system, as many people may have access to the data.
- ✓ Traceability—electronic record systems should be designed in a way that allows for tracing the specimen throughout the entire process in the laboratory. Six months after performing an examination, it should be possible to look at the records and determine who collected the specimen and who ran the test.

Record retention: Retention times for records should be determined in each laboratory, based on a number of factors:

- ✓ The length of time the laboratory will need to have access to its records;
- ✓ Government requirements or standards that dictate record retention times;
- ✓ Whether the laboratory is engaged in ongoing research requiring many years of data;
- ✓ The time interval between the laboratory's assessments or audits.

4.2 Maintaining records of work quality according to the requirements of the organization

The first step in reviewing your department's records and the management of those records should be to identify the type of records being maintained, in what form (paper, electronic, etc.) they exist and for how long they're being retained. As this inventory is being taken, identical records that exist in several places should be noted. Once this inventory process is completed, the next step is to determine the importance of the record(s) to the ongoing operation of your department. The process of determining a record's relative importance can result in the decision to limit its retention period or even to eliminate entirely the need for its further retention. (See the section on "Retention Schedules" for more information.

All businesses need to maintain a variety of records, from expenses receipts in order to fill out the annual tax return, to an up-to-date set of health and safety documents which can help to keep on top of any legal obligations. Ensuring that invoices are all methodically recorded, together with payment dates and any related notes, enables businesses to spot any issues quickly and deal with them efficiently. If you have quite a few clients, maintaining records becomes even more important and it can give you an overview, allowing you to track patterns of payment and detect any consistently late or problematic payers. A friendly chat may be all it takes to nip the problem in the bud and promote a more consistent payment process across all your clients.

4.2.1 Records management procedures

i. Set-up a records retention schedule

Today's increasingly digital environment is fast-paced, creating information quickly and in various formats. Many companies still rely on a "save all" approach when it comes to protecting data. Not only does this waste time and money, but it puts an organization at risk for noncompliance.

Establishing how long to retain records involves the implementation of an accountable records retention policy. A records retention schedule outlines how long records should be kept from an operational and legal standpoint, and that outdated records are disposed of in a timely, systematic manner.

When determining the retention period for your records, it's important to:

- ✓ Perform a record inventory of all physical and electronic records
- ✓ Establish a standardized record classification system
- ✓ Conduct research on all federal, state, and local requirements

By setting a records retention schedule, your organization will benefit from the management of information assets, control storage costs, improve records retrieval, and eliminate legal risks.

ii. Policies and procedures

Your records management program should support policies and procedures both legally and operationally. Policies and procedures set the standard for a compliant records management system. They should include the management of all records and media types, including email. Your company may have separate policies for records retention, active files, unused files, emails, and several other areas of information management.

The records management policies and practices should be communicated clearly and applied consistently throughout your organization. Uniformity and consistency are key drivers to set the foundation for a successful records management practice. When delivered in a proper, well-

strategized manner, your policies and procedures will work simultaneously with your business continuity plan and disaster recovery program.

iii. Accessibility, indexing, and storage

A contributing factor of a successful records management program is the ability to access your information when it's needed. Companies need to obtain information quickly for everyday business operations and compliance requirements.

Indexing parameters, including date, subject matter, creator, and location of the record, are essential to retrieving information promptly and efficiently. Depending on the information type – whether electronic or physical – storage locations may vary.

Electronic records can be stored and retrieved from an online document management system, also known as DMS. For archived documents that are required by law to be kept in physical form, offsite records storage facilities protect information in climate-controlled environments, freeing up office space. By finding a provider that offers scan-on-demand services for records stored offsite, you can quickly retrieve documents anytime, anywhere.

iv. Compliance auditing

The successful outcome of an enterprise records management system will never be achieved if employees are not complying with a company's records management policies and procedures. To ensure compliance by employees, your records management program should receive regular audits.

Components of a records management audit should include:

- ✓ Retention schedule complies with up-to-date laws and regulations
- ✓ Indexing accuracy and accessibility of documents
- ✓ Training and communication among staff and departments
- ✓ Protection and preservation of records
- ✓ Timely and consistent destruction of inactive files

A thorough audit of records management procedures will ensure that historical records are routinely maintained and destroyed in a compliant, well-enforced manner throughout your organization.

v. Disposal of obsolete records

Once you've organized your files and determined the right retention policy, it's time to dispose of unneeded documents. Businesses can encounter trouble when it retains documents for longer than required, including data breaches and hefty penalties. Why chance the risk and keep confidential documents past their legal requirements? Finalize your records retention policy by using shredding services with chain-of-custody procedures and NAID certification to destroy backlog files in a compliant manner.

When considering a records management and shredding company, it's essential to:

- ✓ Determine the type of shredding program suitable for your media or paper records
- ✓ Choose a company that is NAID-certified
- ✓ Ensure all access personnel are background screened at the local, state and national level
- ✓ Provide a certificate-of-destruction for chain-of-custody documentation

Incorporating the timely destruction of records that have reached the end of their life-cycle into your records management plan will reduce the likelihood of a potential audit, legal risks, and storage costs.

4.2.2 Knowing what records are held

The effectiveness of records systems depends on knowledge of what records are held, what information they contain, in what form they are made accessible, what value they have to the organization and how they relate to organizational functions. Without this knowledge an authority will find it difficult to: a) Locate and retrieve information required for business purposes or to respond to an information request; b) Produce a Publication Scheme or a reliable list of information assets available for re-use; c) Apply the controls required to manage risks associated with the records; d) Ensure records are disposed of when no longer needed.

Authorities should gather and maintain data on records and information assets. This can be done in various ways, for example through surveys or audits of the records and information held by the authority. It should be held in an accessible format and should be kept up to date.

Authorities should consider publishing details of the types of records they hold to help members of the public planning to make a request for information.

Self-check 4	

Name----------ID----------Date----------

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Part I: Say true or false

1. Quality record is the documented specific information of a quality management system that relates to the quality performance, procedures, and work instructions.
2. Record is any document - in any format (paper or electronic, and yes even video) - created or received by you or your department - that allows you to conduct business.

Part II: Short Answer Questions

1. Write characteristics of records?
2. Write the importance of record?
3. Write the record management procedures

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AKNOWLEDGEMENT

Ministry of Labor and Skills wish to extend thanks and appreciation to the many representatives of TVET instructors and respective experts who donated their time and expertise to the development of this Teaching, Training and Learning Materials (TTLM).

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