

# UBT208M

## Process payments for beauty purchases

Unit reference number: F/615/0736

Level: 2

Guided Learning (GL) hours: 20

### Overview

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This unit will enable learners to provide retail services for customers. Learners will develop the knowledge and communication skills to enable them to take payment for beauty purchases in a polite, friendly manner. Learners will develop their understanding of the effects behaviour and presentation can have on the retail sales experience, whilst developing their knowledge and skills required to resolve pricing problems.

### Learning outcomes

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On completion of this unit, learners will:

LO1 Know how to process payment for purchases in a retail environment

LO2 Be able to process payment for purchases in a retail environment

# Assessment requirements

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Learners must complete **all** four assessment requirements related to this unit:

1. Service portfolio
2. Graded practical assessment
3. External examination
4. Graded synoptic assessment

## 1. Service portfolio

Learners must produce a service portfolio. The service portfolio must contain evidence that learners have:

- Taken all types of payment for purchases
  - Cash payments
  - Credit/debit card payments
  - Gift voucher payments

The service portfolio must be completed prior to learners undertaking the graded practical skills test. Whilst treatment portfolios will not be graded, they may be sampled by the VTCT External Quality Assurer (EQA).

Evidence from the graded practical assessment must also be presented in the service portfolio.

## 2. Graded practical assessment

Learners must carry out a complete retail service which will be observed, marked and graded by centre assessors. The grade achieved in the graded practical assessment will be the grade awarded for the unit.

The graded practical assessment must take place in a real or realistic working environment on a real customer. At a minimum the graded practical assessment for this unit must cover:

- Process payment – complete the processing of a payment for beauty purchases in a retail environment. Take payment for a minimum of one item or one service, completing the transaction from start to finish

Recorded professional discussion can also be used as an assessment method attached to the graded practical assessment and is particularly useful for gathering evidence for criteria related to evaluation and reflection. Professional discussions should be planned and recorded.

## 3. External examination

Whilst the theory content of LO1 may be naturally assessed in the graded practical assessment, they will be tested by an external examination towards the end of the period of learning.

External examinations will test knowledge and understanding from across the whole vocational area (mandatory units). Learners should use the unit content section of this unit to aid revision since exam questions will test the full breadth of this section.

External examinations will be set and marked by VTCT and will contribute to the overall qualification grade.

## 4. Graded synoptic assessment

In the last term or final third of their qualification, learners will be required to undertake a graded synoptic assessment. This will require learners to carry out a range of services from across the whole vocational area (mandatory units). Assessment coverage will vary year on year, although all services will be covered over time.

VTCT will set a brief for centres which will detail the services to be covered in the graded synoptic assessment. Grading descriptors for the synoptic assessment will also be provided by VTCT.

The graded synoptic assessment will be marked and graded by centre staff and externally verified by VTCT.

The graded synoptic assessment will contribute to the overall qualification grade.

## Unit content

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### LO1 Know how to process payment for purchases in a retail environment

#### **Learners must know how to resolve pricing problems:**

- Referring to reliable pricing information such as online pricing guide from head office
- Seeking advice from the person who can provide clarification when pricing information is unclear or unavailable, for example account manager or department manager, senior therapist/salon owner

#### **Learners must know the pricing structure and understand how and when offers can affect this:**

- Informing customers of the correct amount to pay, taking account of any special offers or discounts that apply

#### **Learners must know how to process payments in line with organisational procedures, where the payment is acceptable:**

- Cash payment – checking cash and giving correct change
- Credit/debit card payments – checking signatures, allowing access to the card machine
- Loyalty point payment – check eligibility for the purchase intended
- Gift card payment – check currency and dates of card for eligibility
- Receipts given, customer copy and organisation copy recorded as per establishment procedure. Till processing electronic and computer generated

#### **Learners must know how and when additional services should be offered to the customer:**

- Understand the importance of link selling and the possibility of further sales by offering further assistance and greater advice of additional products and services
- If payment is for services provided, offer to rebook for next treatment demonstrating awareness by promoting any special offers. Starting a dialogue with the customer will allow for accurate prescription of samples for the customer to try to enhance future retail opportunities

#### **Learners must know how to treat customers politely throughout the payment process:**

- Salon procedure and protocols are adhered to at all times. Customer greeted with good eye contact, a smile and a polite greeting
- Customer must be treated with politeness – saying “hello”, “good morning/afternoon” and “thank you” are all part of good customer service; using good manners is appropriate whether the customer makes a purchase or not
- Respect and courtesy should be applied at all stages of the transaction. An understanding of the need to ensure professional courtesy at all times
- Professionalism – all customers should be treated professionally, which means the use of competence or skill expected of the professional. Professionalism shows the customer they are cared for

#### **Learners must understand the importance of acknowledging other customers who are waiting to pay or to be helped in some other way:**

- Understand the importance of making all customers feel valued and that their custom is valued. A signal such as eye contact and a smile can sometimes be all it takes. Understanding when to engage in a comment such as “I shan’t keep you long” but not making the present customer feel rushed or undervalued
- Understanding the value of promptness in customer service – promises for delivery of products must be on time. Delays and cancellations of products should be avoided

**Learners must know how to explain to customers tactfully that payment has not been approved:**

- Keep it quiet – having a credit card denied can be embarrassing for the customer. Ensure you make them feel as comfortable as possible. Do not broadcast the news. The rest of the queue does not need to know that the customer's credit card has been declined. Say it quietly enough so that just you and the customer hear it, preventing further embarrassment
- Do not go into detail – when you inform a customer that his or her card has been declined, they will probably ask why. They may get defiant and want you to know they have enough funds to pay for the transaction. You do not need to go into detail. In fact, you will not even know why the card was declined, so let the customer know that. Tell them they should call their bank or credit card company to sort everything out
- Ask the customer which other method of payment they'd like to use – ask the customer "What other form of payment would you like to use?" this shows them that you still have confidence in them, and it can be helpful in saving the transaction for your business. If they do not have another way to pay, do not make a big deal out of it. Ask them if they would like you to hold their purchase. If not, just put it away quietly

## LO2 Be able to process payment for purchases in a retail environment

### **Greet customers in a polite and friendly manner:**

- Polite, courteous, respectful, speaking clearly, concisely and friendly manner. Treating customers politely throughout the payment process

### **Advise customers on the correct payment:**

- Tell customers the correct amount to pay, taking account of any special offers or discounts that apply

### **Use secure payment handling techniques:**

- Cash payments are taken in an appropriate manner – individual notes and coins are checked in line with establishment rules and guidelines. Clearly instruct the customer the amount payable. The amount paid is checked and the correct change calculated and given. The receipt is provided along with the purchase
- Credit/debit card payments are taken in an appropriate manner – the payment is authorised in line with establishment rules and guidelines. Chip and pin – clearly inform the customer the amount that is payable, once payment is sent to the terminal, ask the customer to insert their card into the terminal, check the amount and enter the PIN number. The customer receipt is provided along with the purchase and the organisation's copy is stored in line with company procedure
- Touch card payments are taken in an appropriate manner – the payment is authorised in line with establishment rules and guidelines. Clearly instruct the customer the amount payable, once payment is sent to the terminal instruct the customer to touch their card against the terminal. The receipt is provided along with the purchase
- Check payments are taken in an appropriate manner – signatures are checked and correct procedures are taken
- Gift voucher payments are taken in an appropriate manner and correct procedures are followed. Clearly instruct the customer the amount payable – check the amount payable matches against the credit on the voucher and that the voucher is for the establishment and is still within date. Change for payment must be in line with establishment guidelines (another voucher instead of a cash payment)
- In all cases customer loyalty schemes are adhered to with appropriate rewards given

### **Complete the transaction and thank the customer:**

- Customer is thanked for their custom and the transaction is finalised in an appropriate manner

## Assessment criteria

Assessment criteria will be applied to the graded practical assessment. In order to pass this unit, learners must at a minimum achieve all pass criteria. The pass criteria relate to the proficient demonstration of skills and knowledge. All criteria within a given grade must be achieved to be awarded that grade.

<b>Learning outcome</b> The learner must:	<b>Pass</b> The learner can:	<b>Merit</b> To achieve a merit grade, in addition to achievement of the pass criteria, the learner can:	<b>Distinction</b> To achieve a distinction grade, in addition to achievement of the pass and merit criteria, the learner can:
<b>LO2</b> Be able to process payment for purchases in a retail environment	<b>P1</b> Greet customers in a polite and friendly manner	<b>M1</b> Adjust communication techniques to meet customer needs	<b>D1</b> Promote the retail of additional products and services
	<b>P2</b> Advise customers on the correct payment	<b>M2</b> Establish a rapport and engage with customers	
	<b>P3</b> Use secure payment handling techniques		
	<b>P4</b> Complete the transaction and thank the customer		

## Assessment guidance

Assessors must use the amplified assessment guidance in this section to judge whether assessment criteria have been achieved in the graded practical assessment.

### P1 Greet customers in a polite and friendly manner

Learners must use appropriate greetings when talking to customers. Learners must smile and stop what they are doing to properly acknowledge the customer. The customer should be greeted within 30 seconds of the learner becoming aware of them. The learner must adopt a polite, friendly and professional manner. The learner should ask questions to ascertain the customers' needs. The learner should be dressed professionally as a representative of the company/establishment the learners needs to portray a professional capable image.

### P2 Advise customers on the correct payment

Learners must communicate the amount of the transaction in a clear and concise manner, ensuring any special offers are taken into consideration. Learners must enquire what payment method is preferred and they must check for understanding whilst politely waiting for payment to be made.

### P3 Use secure payment handling techniques

The payment must be taken in line with organisation procedure.

Learners will ensure that cash payments are taken in an appropriate manner; individual notes and coins are checked in line with establishment rules and guidelines. Learners will clearly instruct the customer of the amount payable the offered payment is checked and the correct change calculated and given. The receipt is provided along with the purchase.

Learners will ensure that credit/debit card payments are taken in an appropriate manner and that the payment is authorised in line with establishment rules and guidelines. Chip and pin – learners will clearly instruct the customer the amount payable, once payment is sent to the terminal, learners will ask the customer to insert their card into the terminal, check the amount and enter the PIN number. The customer receipt is provided along with the purchase and the organisation copy is stored in line with company procedure.

Learners will ensure 'touch' card payments are taken in an appropriate manner: the payment is authorised in line with establishment rules and guidelines. Learners will clearly instruct the customer the amount payable, once payment is sent to the terminal, learners will instruct the customer to touch their card against the terminal. The receipt is provided along with the purchase. Learners will ensure check payments are taken in an appropriate manner; signatures are checked and correct procedures are taken.

Learners will ensure gift voucher payments are taken in an appropriate manner and correct procedures are followed. Learners will clearly instruct the customer the amount payable – check the amount payable matches against the credit on the voucher and that the voucher is for the establishment and is still within date. Any differences in the amount required and the voucher value will be calculated and payment adjustments made in compensation.

Learners must ensure change for payment must be in line with establishment guidelines (another voucher instead of a cash payment may be offered as standard). Customer loyalty schemes are adhered to with appropriate rewards given in line will all payment transactions regardless of the methods used. In all cases the learner will take payment in a professional, polite and friendly nature.

#### P4 Complete the transaction and thank the customer

Learners must ensure customers are thanked for their custom and the transaction is finalised in an appropriate manner.

#### M1 Adjust communication techniques to meet customer needs

Learners must demonstrate that they have adjusted their style of communication to suit and respond to the customer. Learners must demonstrate that all communication with the client is ethical, respectful, unobtrusive and inoffensive and of a suitable and appropriate content and context. Learners will be aware of their own and the customers body language, ensuring they portray a positive, friendly image. Learners must give customers the opportunity to digest any technical information they may have provided and encourage clients to ask questions or look at ways of rephrasing the information if it seems the customer does not understand. Learners must be confident in asking probing questions in a sensitive manner. Learners must show that they can assure and reassure the client throughout the exchange. Learners must demonstrate consideration of the individual needs of the client.

#### M2 Establish a rapport and engage with customers

Learners must demonstrate that they have managed to establish a rapport with the customer and engaged them in conversation.

The learner will initiate a conversation with the customer or take the lead from the customer and draw them into further conversation by using open-ended questioning techniques (for example – what other plans do you have for the day?). The function of the conversation is to establish a rapport with the customer to enhance their purchasing experience by feeling valued as an individual.

Learners must demonstrate that the conversation is controlled and conducted in an open friendly manner with respect of boundaries, with the learner exhibiting awareness of the customer's privacy. The learner will demonstrate efficient use of time to ensure all purchases are achieved in a timely manner but of sufficient time as to make the customer feel valued and not rushed.

## D1 Promote the retail of additional products and services

Learners must demonstrate that they have at a minimum recommended one relevant product or additional service in addition to the product or service the customer is already purchasing. Learners must demonstrate awareness of current special offers by promoting them. Learners must provide advice on appropriate linked products to the product being sold, along with additional home care tip and techniques for use, to assist in the retail of additional products or services.

The learner will start a dialogue to seek to determine the customer's motivations and objectives and to understanding the clients' needs for their purchases, so they know how to best advise them and to allow for accurate prescription of samples for the customer to try to enhance future retail opportunities.

The learner will offer advice regarding the suitability of purchasing the product(s) or services; in turn the learner will ensure the client understanding the correct procedures or methods of using and applying the product or service. Additionally, the benefits and effects and any other influencing factors will have been fully explained along with the expected frequency for product or service usage. Price ranges and affordability will have been fully explored. Learner will ensure both parties are able to consider all the facts based upon effective questioning methods employed by the learner prior to the purchase.

The promoting of the product and service leaves the client confident and assured that they have purchased the correct product that is suitable for their specific needs.

Learners should recommend further follow-on, alternative or additional beauty treatments and offer to re-book the client for their next appointment. The learners must ensure any request for further assistance is met with courtesy and an informed manner, with all advice given accurate and helpful.

## Resources

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The special resources required for this unit are access to a real or realistic working environment which has access to a good stock of retail products which supports the provision of a retail service.

## Delivery guidance

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Teachers are encouraged to use innovative, practical and engaging delivery methods to enhance the learning experience. Learners may benefit from:

- Meaningful employer engagement so they relate what is being learned to the real world of work and understand commercial competency and retail opportunities of products
- Work experience within a commercial retail environment so they can practise their skills in a real environment
- Using interactive information and technology, systems and hardware so they can learn about concepts and theories, research current trends, research product knowledge and produce commercial aids

## Links with other units

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This unit is closely linked with the following units:

### UCO34M Health, safety and hygiene

The health and safety unit will provide knowledge and understanding of the responsibilities for health and safety as defined by any specific legislation covering the role of a professional therapist. This unit greatly underpins all practical unit delivery.

### UBT205M Consultation and record keeping

Client consultation is an effective and necessary tool for the beauty consultant to help establish the unique needs and requirements of the customer so they can recommend the most appropriate products and provide the best advice. Effective record keeping will allow the consultant to keep the customer informed of any offers or promotions and will inform any future campaigns as to the specific needs and requirements of the customer, making marketing more effective. The consultation and record keeping unit underpins all technical units within this qualification and should be delivered prior any technical beauty therapy unit.

### UBT207M Display stock to promote beauty sales

This unit additionally underpins the other units within the nail technologies qualification by introducing the learner to the reasons for and the methods of creating eye-catching displays using promotional materials, equipment and stock from the concession/salon. The knowledge of this unit will allow learners to plan, preparation and maintenance a display assisting with promoting additional products or services of the concession/salon.

### UBT203M Promote and encourage beauty retail sales

Knowledge of how to identify products and inform the customer of the features and benefits of the products to ensure that they meet their needs. Improving customer service and gaining commitment from the customer to use professional products as well as maintaining the results from the recommended products. It will enable learners to make clear, informed selections and recommendations for product use.

### Graded synoptic assessment

At the end of the qualification of which this unit forms part, there will be a graded synoptic assessment which will assess the learner's ability to identify and use effectively in an integrated way an appropriate selection of skills, techniques, concepts, theories, and knowledge from a number of units from within the qualification. It is therefore necessary and important that units are delivered and assessed together and synoptically to prepare learners suitably for their final graded assessment.