



*Office Administration  
and Customer Care*

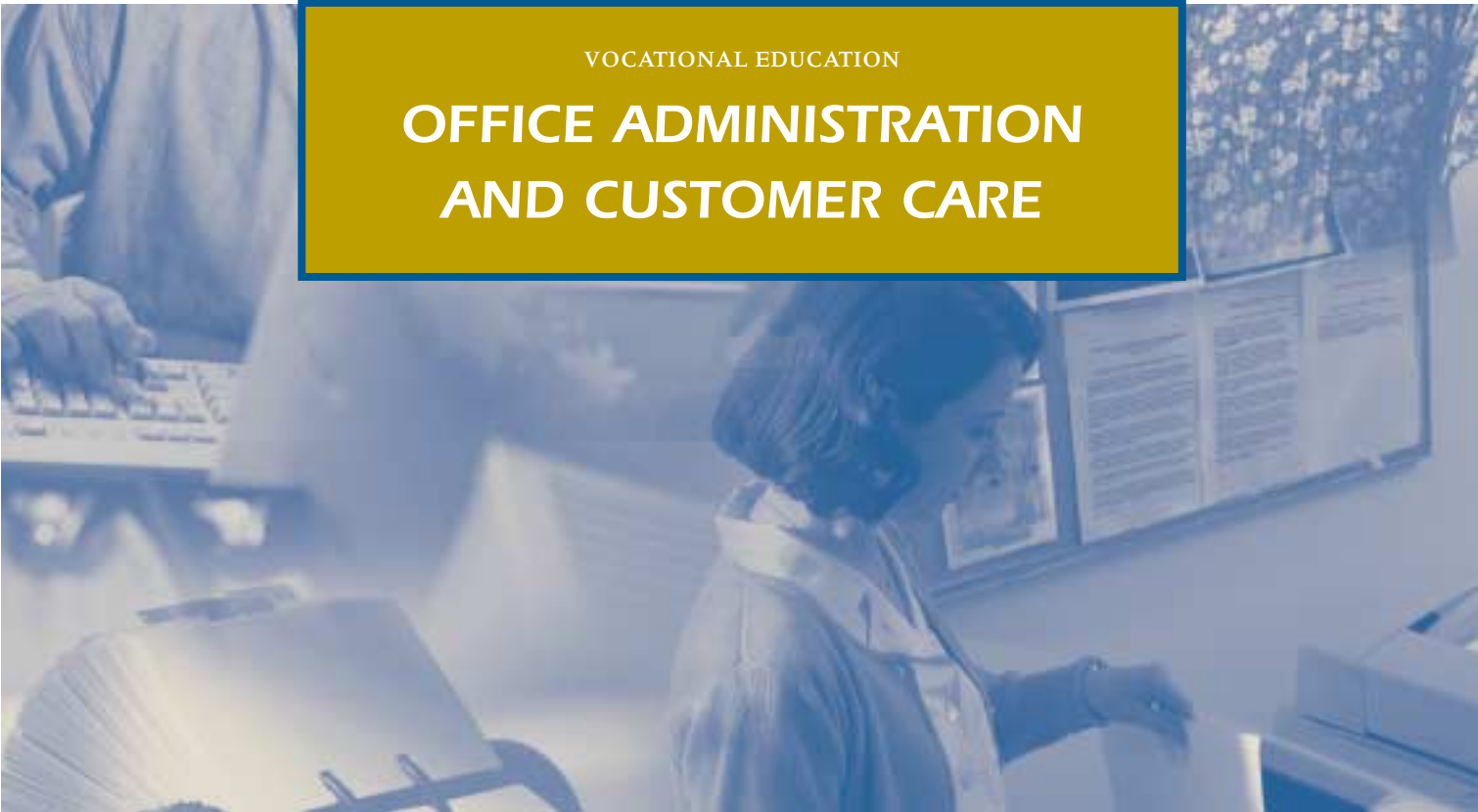




LEAVING CERTIFICATE APPLIED

VOCATIONAL EDUCATION

**OFFICE ADMINISTRATION  
AND CUSTOMER CARE**





# CONTENTS

<b>INTRODUCTION</b>	3
Rationale	3
Number and Sequence of Modules	4
Description of Modules	4
General Recommendations	5
<b>MODULE 1</b>	
RETAILING & SELLING	7
Purpose	8
Prerequisites	8
Aims	8
Units	8
Unit 1: The Retail Organisation	9
Unit 2: Selling Techniques	11
Unit 3: Customer relations	12
Resources	13
Key Assignments	14
<b>MODULE 2</b>	
OFFICE ASSISTANT	15
Purpose	16
Prerequisites	16
Aims	16
Units	16
Unit 1: Understanding the role and function of the office	17
Unit 2: Filing	19
Unit 3: Communications and the Office	20
Resources	21
Key Assignments	22

**MODULE 3**

OFFICE PRACTICE	23
Purpose	24
Prerequisites	24
Aims	24
Units	24
Unit 1: Recording information	25
Unit 2: Petty cash	26
Unit 3: Personal and interpersonal skills	27
Unit 4: Health and safety	28
Key Assignments	29

**MODULE 4**

RETAILING & THE CONSUMER	31
Purpose	32
Prerequisites	32
Aims	32
Units	32
Unit 1: Consumer and the law	33
Unit 2: Calculations and payments	34
Unit 3: Advertising and display	35
Unit 4: Being an employee	36
Resources	37
Key Assignments	38

## INTRODUCTION

### **RATIONALE**

The Office Administration and Customer Care course is designed to develop in students, skills and competencies of a broad personal and vocational nature. This course should provide as many opportunities as possible for practical activities and to this end it is recommended that a practice office is set up in the classroom.

## NUMBER AND SEQUENCE OF MODULES

The order of completion of these modules is at the discretion of the teacher/school, however it is recommended that Module 2: Office Assistant be completed before Module 3: Office Practice.

The course consists of four modules

1. Retailing and Selling
2. Office Assistant
3. Office Practice
4. Retailing and the Consumer

## DESCRIPTION OF MODULES

### **MODULE 1: RETAILING AND SELLING**

This module is designed to introduce students to the structure of retail organisations. It looks at how changes in lifestyle have influenced retailing in Ireland. It prepares students to engage in good selling practices and introduces the student to the personal skills and qualities needed by a salesperson.

### **MODULE 2: OFFICE ASSISTANT**

This module is intended to introduce the student to the practical skills needed in an office. It is necessary to have access to certain office equipment to deliver the module. It also emphasises the use and practice of good communication techniques.

### **MODULE 3: OFFICE PRACTICE**

This module is designed to help students to record information accurately and to develop good practice in relation to simple office accounts. It also promotes good practice in relation to health and safety in the office environment.



**MODULE 4: RETAILING AND THE CONSUMER**

This module is designed to allow the student to become proficient at dealing with the customer and to become familiar with the legal rights of the customer. It builds on the skills acquired in the Retailing and Selling module and also introduces the concept of industrial relations.

**GENERAL RECOMMENDATIONS**

The Teacher Guidelines provide suggestions in relation to classroom practice. The guidelines are not prescriptive. There is scope for teachers to exercise their own professional judgement based on the interests, needs and abilities of the group. However, it is essential that the fundamental principles of the Leaving Certificate Applied be upheld. Teachers are therefore required to adopt a methodology that is student centred, activity based and affirming. The course will require 4 class periods of approx. 40 minutes per week. To facilitate out-of-school activity it is recommended that these periods are timetabled as double periods.



MODULE 1

**RETAILING & SELLING**

## MODULE 1:

# RETAILING & SELLING

### PURPOSE

The purpose of this module is to familiarise the students with the role of the retailer in the chain of distribution and to allow the students to develop an understanding of the importance of the selling situation.

### PREREQUISITES

None.

### AIMS

This module aims:

- to develop students' understanding of the features of a retail organisation from an outsiders point of view
- to help students to appreciate the importance of conducting a sale in an appropriate manner
- to develop students' appreciation of the importance of good interpersonal skills when dealing with customers.

### UNITS

Unit 1: The Retail Organisation

Unit 2: Selling Techniques

Unit 3: Customer Relations

## Unit 1: The retail organisation

### LEARNING OUTCOMES

The student should be able to:

1. identify different types of retail organisations
2. list the members of the chain of distribution
3. understand the role of the wholesaler
4. understand the role of the retailer
5. identify characteristics/methods of operation of different retail outlets (sole trader, multiple store, department store, superstores, hypermarkets and co-operatives)

### TEACHER GUIDELINES

- ▶ Brainstorm in class. Refer to work experience and part-time employment.
- ▶ Manufacturer, wholesaler, retailer, consumer, seek examples of when this chain differs, e.g. manufacturer to consumer, mail order etc.
- ▶ Role of the wholesaler to both the retailer and the manufacturer. Visit a local cash and carry or other wholesale outlet to look at stocktaking methods, storage techniques, use of bar coding etc.
- ▶ Role of the retailer to both the wholesaler and the consumer. Visit various retail outlets, draw plans of the various layouts, interview staff. This can be a specially arranged visit or linked with work experience or part-time work.
- ▶ Carry out a survey of different types of retail outlets to check their methods of selling.

**Unit 1: The retail organisation (Continued)****LEARNING OUTCOMES**

6. identify how changes in lifestyle have influenced retailing
6. understand the differences between the methods of non-shop retailing (i.e. mail order, TV selling, newspapers, parties, internet selling)
8. explain modern developments in retailing (i.e. Franchising, Discount Stores).

**TEACHER GUIDELINES**

- ▶ Brainstorm lifestyle changes e.g. greater demand for convenience food, low fat food, greater teenage spending etc.
- ▶ Get students to collect mail order brochures, catalogues from retail parties (Tupperware, etc.) video shopping channels. Look up the internet on some shopping sites. Hold class discussion on any experiences of using these methods of shopping.
- ▶ Examine newspaper sale advertisements and pick out the different retail types. Identify franchise operations in the local area.

## Unit 2: Selling techniques

### LEARNING OUTCOMES

The Student should be able to:

1. understand the functions of the salesperson
2. practise the personal qualities and skills needed by the salesperson
3. distinguish between selling situations (self-service, self selection, and personal service).

### TEACHER GUIDELINES

- ▶ Functions include:  
to sell, care for stock, take payments, be vigilant, deal with cash complaints. Refer to experiences from work experience and part-time work.
- ▶ Qualities include:  
ability to listen, pleasant/outgoing, clarity of speech, enthusiasm.  
Link with the English and Communication teacher who will be dealing with many of these qualities.
- ▶ Role-play the different situations or get students to recall the different situations from work experience or part-time work.

### Unit 3: Customer relations

#### LEARNING OUTCOMES

The Student should be able to:

1. understand why the customer is always important
2. greet customers in an appropriate manner
3. recognise when it is appropriate that the customer should be allowed to browse
4. demonstrate the importance of product knowledge when selling i.e. functions, special features, materials, origins
5. explain the means of building customer loyalty
6. maintain courtesy throughout a sale
7. deal with customer services such as returns.

#### TEACHER GUIDELINES

- ▶ Get students to recall "good" and "bad" shopping experiences.
- ▶ Role-play different situations.
- ▶ Brainstorm situations where students were not allowed to browse and where service was overpowering.
- ▶ Role-play selling situations using different products or services.
- ▶ Discuss special promotions, sales, policy on returns, alterations, after-sale service etc.
- ▶ Role-play selling situations.
- ▶ Role-play situations. Get examples of credit notes. Discuss the legal position on returns.



## RESOURCES

*RGDATA Handbook*, by Michael Campbell. A folder of A4 sheets giving all the information the retailer needs to know on the law etc. Cost £49 approx

*Crowning the Customer*, by Feargal Quinn

*Selling Techniques for Supermarkets* – Consumer Choice.

Retailing, Irish Business Manuals, available in Waterstones

Irish Times, Business 2000 – Case Studies.



# KEY ASSIGNMENTS

MODULE 1: RETAILING AND SELLING

## CHECKLIST

I have visited a retailer or wholesaler as part of a class exercise and have drawn up a short report on that visit

I have listed five different types of retailers and explained three points on how they operate

I have looked up the internet to examine on line shopping

I have completed a short survey on how people shop in my own area.

MODULE 2

**OFFICE ASSISTANT**

## MODULE 2:

# OFFICE ASSISTANT

### PURPOSE

To introduce the student to basic office tasks thus enabling the student to be able to perform simple functions. It also ensures that the learner understands the methods of communication available in the office.

### PREREQUISITES

None.

### AIMS

This module aims:

- to develop students' understanding of simple office functions
- to provide students with the opportunity to acquire simple practical skills necessary to perform some routine office duties
- to develop students' appreciation of the importance of communication in any work environment.

### UNITS

Unit 1: Understanding the role and function of the office

Unit 2: Filing

Unit 3: Communications and the Office.

## Unit 1: Understanding the role and function of the office

### LEARNING OUTCOMES

The Student should be able to:

1. outline the different types of office layouts
2. identify the functions of an office in relation to information (e.g. receipt, collection, recording, sorting, classification, storage, communication and protection)
3. list the different departments found within an office and identify the main roles of each of these departments (e.g. wages, accounts, mail, purchasing)
4. present an organisational chart
5. demonstrate the use of common office equipment (e.g. photocopier, calculator, stapler, guillotine, telephone, fax, filing cabinet)

### TEACHER GUIDELINES

- ▶ Get students to draw different types of layout. Encourage students to observe different layouts while on work experience.
- ▶ Business textbooks can be used. Encourage students to be aware of the office functions while on work experience even when the student is not working in an office environment.
- ▶ The student should be aware of how each of these functions is carried out. Students can collect employment advertisements from newspapers, the Internet etc. to check qualifications and training necessary for such jobs.
- ▶ Any form of chart is acceptable.
- ▶ The teacher needs to ensure that he/she has access to the listed equipment. These can be demonstrated and practised throughout the module. Students should have obtained a competency in all of these by the end of the module. The student can also be encouraged to observe and use, if appropriate, various office equipment while on work experience.

**Unit 1: Understanding the role and function of the office (Continued)****LEARNING OUTCOMES**

6. use common items of office stationery and supplies (e.g. headed paper, envelopes, memos, diaries, paper clips, correction fluid)
7. use a range of standard paper and envelope sizes
8. write a business letter and address an envelope
  
9. identify the uses of common generic computer applications packages (word processing, data base, spreadsheets).

**TEACHER GUIDELINES**

- ▶ The teacher should ensure that there is a supply of the listed items available for the students use.
  
- ▶ Encourage students to use wizards on word processing packages to check different layouts. Get students to collect samples of letterheads and envelopes while on work experience.
  
- ▶ The operation of the packages is not required here as this will be covered in the ICT module. However use of these packages should be encouraged wherever possible.

## Unit 2: Filing

### LEARNING OUTCOMES

The student should be able to:

1. explain the importance of an efficient filing system
2. list the essential elements of a filing system
3. use a variety of different methods of filing
4. demonstrate the use of these methods effectively.

### TEACHER GUIDELINES

- ▶ Having access to a filing cabinet for class material and thus allowing the students to maintain it can achieve this.

### Unit 3: Communications and the office

#### LEARNING OUTCOMES

The student should be able to:

1. use some of the means of transmitting information (e.g. telephone, fax, electronic mail)
2. identify circumstances when the telephone, fax, modem, electronic mail are used
3. demonstrate an ability to use correct telephone techniques including receiving, recording, dealing with irate customers, making calls for third parties and receiving messages for third parties
4. identify the common methods of reproducing documents in the office (e.g. photocopiers, printers)
5. demonstrate an ability to use the photocopier to make double sided copies of multiple page documents, to enlarge and reduce documents on a photocopier.

#### TEACHER GUIDELINES

- ▶ Access to a photocopier and telephone and other equipment is needed to complete this unit.
- ▶ A class visit to an office would be a useful introduction to this unit.
- ▶ Role-play to start then use actual phones to make calls. A telephone training system can also be used.
- ▶ Access to the school photocopier is necessary or other alternative arrangements e.g. suitable work experience.



## RESOURCES

*In Business*, by Stack/McGeady. Published by The Education Company



# KEY ASSIGNMENTS

MODULE 2: OFFICE ASSISTANT

## CHECKLIST

I visited an office and explained the main type of work done there

I practised different methods of filing

I have presented a hand-written or word-processed business letter and envelope and I listed 5 items of office stationery/supplies and what they are used for

I used the photocopier, calculator, stapler, guillotine, filing cabinet, telephone and fax machine and used e-mail.

MODULE 3

**OFFICE PRACTICE**

## MODULE 3:

# OFFICE PRACTICE

### PURPOSE

This module has been developed to enable the student to become familiar with the office environment. It provides experience in routine office tasks and ensures that the student fully understands the importance of personal grooming.

### PREREQUISITES

Office Assistant Module.

### AIMS

This module aims:

- to develop students' understanding of the importance of accurate recording of information in the office
- give students the opportunity to acquire practical skills necessary to carry out routine office functions
- to develop students' appreciation of the importance of working in a safe environment
- to promote the development of good interpersonal skills with class/work colleagues.

### UNITS

Unit 1: Recording information

Unit 2: Petty cash

Unit 3: Personal and interpersonal skills

Unit 4: Health and safety.

## Unit 1: Recording Information

### LEARNING OUTCOMES

The Student should be able to:

1. sort incoming mail
2. record visitors to the organisation
3. record receipts and payments (with 4 analysis columns)
4. record outgoing mail
5. record verbal messages correctly.

### TEACHER GUIDELINES

- ▶ The student can be encouraged to do this in the school office and in small groups.
- ▶ The student should be able to keep a list showing date, name and purpose of the visit of the visitor.
- ▶ Receipts and payments (cash and bank) can be recorded in a two-sided cashbook or by means of a receipts page and a payments page. (Four analysis columns) Closing balance must be calculated.
- ▶ The students should know how to write up a Postage Book showing date, addresses, item cost and special features if any.
- ▶ Any type of memo for recording phone messages and personal caller messages is acceptable.

## Unit 2: Petty cash

### LEARNING OUTCOMES

The student should be able to:

1. explain the purpose of petty cash
2. record transactions in a 4 columnar petty cash book
3. explain the imprest system of petty cash.

### TEACHER GUIDELINES

- ▶ As well as practising the correct recording procedure for petty cash students can be encouraged to use petty cash books for recording incoming and outgoing cash during their enterprise module or any other activities organised by them as a group during the year.

### Unit 3: Personal and interpersonal skills

#### LEARNING OUTCOMES

The student should be able to:

1. work as part of a team
2. listen to and follow instructions
3. work under supervision
4. formulate questions in order to gather information
5. pay attention to detail in the execution of all office duties
6. appreciate the importance of good personal hygiene/grooming
7. appreciate the importance of timekeeping
8. appreciate the importance of maintaining a good attitude to work.

#### TEACHER GUIDELINES

- ▶ Liaise with the enterprise teacher to achieve this learning outcome. This can also be achieved through students organising an event or outing for the class.
- ▶ Following instructions accurately and working under supervision should be encouraged throughout the module and also linked to work experience.
- ▶ Students can prepare questions for a simple survey.
- ▶ A visitor to the classroom to demonstrate good grooming, make-up, hygiene, dress, correct diet and exercise can be very effective.
- ▶ Brainstorm on timekeeping methods encountered by students while on work experience or part-time job.
- ▶ Link with the vocational preparation teacher and also brainstorm on experiences of the students while on work experience and part-time jobs.

## Unit 4: Health and Safety

### LEARNING OUTCOMES

The student should be able to:

1. use office equipment safely (e.g. guillotine, electrical equipment, lifting, rest periods)
2. recognise and avoid potential hazards in the office
3. understand the main provisions of the Health and Safety at Work Act
4. understand the importance of fire regulations.

### TEACHER GUIDELINES

- ▶ The learning outcomes in this unit can be achieved by having a visit from a health and safety officer to the classroom or a class visit to a suitable industry.
- ▶ Students should be encouraged to pay particular attention to Health and Safety while on work experience.
- ▶ Leaflets can be obtained from the Health and Safety Authority, Dublin. Leaving Certificate Business textbooks also contain the main provisions of the Health and Safety at Work Act.
- ▶ A visit from a fire officer who could help students prepare for a fire drill.





# KEY ASSIGNMENTS

MODULE 3: OFFICE PRACTICE

## CHECKLIST

I have completed a Receipts and Payments Book showing a closing balance for cash and bank, manually or by computer

I have written up a Petty Cash Book using the Imprest System with four analysis columns, manually or on computer

I have written up a Postage Book correctly

I have taken part in a Health and Safety exercise and compiled a short report on the activity.  
(This exercise could be a survey of Health and Safety in a particular room in the school or exit points or a fire drill or report on a visit of a health and safety officer to the classroom or writing a safety statement for their own classroom or any other such activity).



MODULE 4

**RETAILING & THE CONSUMER**

## MODULE 4:

# RETAILING & THE CONSUMER

### PURPOSE

This module prepares the students for employment in a retail organisation. It allows the student to appreciate the importance of consumer loyalty to the retailer and to understand the responsibilities of the retailer to his/her employees.

### PREREQUISITES

Retailing and Selling module.

### AIMS

This module aims:

- to develop students' appreciation of the importance of good presentation and merchandising skills
- to promote students' recognition of the responsibilities of the retailer to the consumer
- to develop students' awareness of the legal rights of the employee
- to help students learn how to handle payments in an appropriate manner.

### UNITS

Unit 1: Consumer and the law

Unit 2: Calculations and payments

Unit 3: Advertising and display

Unit 4: Being an employee

## Unit 1: Consumer and the law

### LEARNING OUTCOMES

The student should be able to:

1. define a consumer
2. differentiate between goods and services
3. explain what is meant by proof of purchase and prepare a receipt
4. explain the importance of keeping a proof of purchase
5. outline the legal responsibilities of a retailer towards his/her customer under current law (i.e. the Sale of Goods and Supply of Services Act 1980)
6. deal effectively with customer complaints in accordance with house policy
7. check policies on delivery
8. outline the retailer's responsibilities under the Consumer Information Act 1978.

### TEACHER GUIDELINES

- ▶ Brainstorm the different situations when the students have been consumers.
- ▶ Get students to collect examples of different types of receipts.
- ▶ Encourage students to issue receipts when running their enterprise.
- ▶ Get students to write to the Consumer Association of Ireland for this information. This information is also available on the internet.
- ▶ Research different policies on complaints, returns etc. role-play different situations as a consumer.
- ▶ Find out if delivery is free or charged on various items.
- ▶ Information available in Leaving Certificate Business textbooks.

## Unit 2: Calculations and payments

### LEARNING OUTCOMES

The student should be able to:

1. calculate VAT inclusive and VAT exclusive prices
2. calculate cash and trade discounts and allowances
3. understand the difference between mark-up and margin
4. calculate mark-up
5. demonstrate an ability to follow proper cash register procedures
6. complete bank lodgement forms
7. sort cash for lodgement
8. prepare invoice, credit note, debit note, cheque and receipt
9. use the correct procedures when handling cash transactions
10. deal with refunds, voids, vouchers, credit notes, cash collections
11. recognise situations and follow correct procedures when the supervisor's signature is required
12. follow the correct procedures for validating cheques
13. follow the correct procedures for credit card, cheque card, laser card and debit card transactions.

### TEACHER GUIDELINES

Some of these procedures will also be practiced in Mathematical Applications.

- ▶ A cash register is required for this unit. If the school does not have one available the teacher could arrange a visit to a local retailer so that the use of a cash register can be practised. Some students may be able to practise this during work experience or in part-time jobs.
- ▶ Lodgement forms available from banks, building societies etc.
- ▶ These learning outcomes are best achieved by practising in actual situations where possible. Opportunities within the school include the enterprise module, organisation of events, collections for charity or fundraising etc. Outside of school students should be encouraged to observe or practise if possible during work experience or part-time work.

### Unit 3: Advertising and display

#### LEARNING OUTCOMES

The student should be able to:

1. distinguish between different types of display
2. identify the specific areas within a retail unit for display
3. recognise effective merchandising and methods of promotion within a store
4. understand the importance of good atmosphere and layout in the retail organisation
5. create examples of the different types of promotion (advertising) in retailing, the media, outdoor advertising, transport advertising, point of sale materials, in-store promotions.

#### TEACHER GUIDELINES

- ▶ Organise a visit to various types of retail outlet and observe and sketch different types of display.
- ▶ Observe how goods are grouped and the sequence of displays etc.
- ▶ Gather examples of the type of music played in shops, the type of atmosphere e.g. through furnishings, flooring etc.
- ▶ Design a group collage or tape or other form of advertisement for a good or service. Link with the enterprise teacher to prepare a stand for the enterprise trade fair. Prepare a display in the school for Christmas or St. Patrick's Day or Easter.

## Unit 4: Being an employee

### LEARNING OUTCOMES

The student should be able to:

1. complete an application form for employment
2. identify the basic legal rights of an employee
3. identify the responsibilities of an employee
4. identify the role of industrial relations practices in the workplace e.g. trade unions, workers councils etc.
5. understand the importance of a contract of employment
6. explain the purpose of keeping employee records.

### TEACHER GUIDELINES

- ▶ Link with the Vocational Preparation teacher.
- ▶ Information on rights and responsibilities of an employee available from trade unions and in Leaving Certificate business textbooks.
- ▶ Arrange a visit from a trade union representative to the class.
- ▶ Encourage students to seek examples of contracts of employment while on work experience or examples from their own part-time jobs. Remind students that contracts of employment are not always in writing.
- ▶ The function of basic records such as time sheets, holiday sheets, medical certificates, disciplinary records are what is required here.



## RESOURCES

### STUDENT TEXT

*Retail Distribution*, by Dale and Banfield. Pitman publication

### TEACHER RESOURCES

*RGDATA Handbook*, by Michael Campbell. A folder of A4 sheets giving all the information the retailer needs to know on the law etc. Cost £49 approx

*Crowning the Customer*, by Feargal Quinn

*Understanding Trade Unions, yesterday and today*,  
O'Brien Educational Press, Dublin

Labour of Love, video from ICTU, 16 Raglan Road, Dublin 4

### SOME USEFUL ADDRESSES

Consumer Association of Ireland	<a href="http://www.consumerassociation.ie">www.consumerassociation.ie</a>
Health and Safety Authority	<a href="http://www.has.ie">www.has.ie</a>
Euro Changeover Board of Ireland	<a href="http://www.irlgov.ie/ecbi-euro">www.irlgov.ie/ecbi-euro</a>



# KEY ASSIGNMENTS

MODULE 4: RETAILING & THE CONSUMER

## CHECKLIST

I have completed book keeping exercises in which I calculated cost price, unit cost, mark up and selling price

I have prepared a window display or product display as part of a team

I have completed a short report on a visit to/visit from a union representative

I have drawn up a contract of employment and I have identified the rights of the employee in it.



Published by The Stationery Office  
To be purchased directly from:  
Government Publications Sales Office,  
Sun Alliance House,  
Molesworth Street, Dublin 2.  
Or by mail order from:  
Government Publications, Postal Trade Section,  
4-5 Harcourt Road, Dublin 2.  
Tel: 01-647 6834/5 Fax: 01-475 2760  
Or through any bookseller.  
Price: £1.50



This programme has been funded by the European Social Fund

Designed by: Langley Freeman Design Group Limited  
© 2000 Government of Ireland

