

## SFHOPTR14

### Deploy optical practice/store resources to meet identified requirements



#### Overview

This standard is about your responsibilities for ensuring the smooth running of the optical practice/store. It involves making sure that the practice resources are understood and in place according to the practice/store requirements in order to achieve its business objectives. This includes ensuring that your practice/store holds the necessary optical stock levels needed to meet business requirements. The optical products that are described here are those that are relevant to your practice/store so they might involve display frames, contact lenses and other products. Users of this standard will need to ensure that practice reflects up to date information and policies.

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### Performance criteria

#### Forecast and plan to meet expected levels of business

*You must be able to:*

- P1 draw up a forecast of estimated sales and professional fee income based on historical information
- P2 communicate team targets
- P3 allocate targets to individuals according to their expertise and responsibilities
- P4 brief personnel on priorities and changes
- P5 organise staff rosters that take account of individual expertise and planned staff absences
- P6 reallocate roles and responsibilities in the event of unplanned absences according to practice requirements
- P7 maintain records in accordance with practice/store requirements

#### Monitor business performance of the optical practice/store

*You must be able to:*

- P8 identify good and poor performance by reviewing sales performance at regular intervals
- P9 communicate to the team instances of good performance
- P10 report performance deficiencies and suggest improvements to address them
- P11 implement a plan to address identified weaknesses
- P12 maintain records in accordance with practice requirements

#### Monitor optical stock levels

*You must be able to:*

- P13 ensure that stock remains at the agreed level by reviewing stock levels at regular intervals
- P14 rotate stock to ensure that out of date stock is not sold
- P15 dispose of products not within their 'use by' dates in accordance with legal
- P16 report anomalies and shortfalls in accordance with practice/store requirements
- P17 adhere to security requirements at all times
- P18 maintain records according to practice/store requirements

#### Maintain optical stock to agreed levels

*You must be able to:*

- P19 maintain and display the agreed amount of stock at the right time

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- according to the stock and display plans
- P20 propose variations to the range of stock that are likely to improve sales
- P21 implement variations to the range of stock within your level of your authority
- P22 confirm stock received against delivery notes and the original order
- P23 resolve inconsistencies between stock received and expectations
- P24 ensure that stock is priced and displayed according to practice/store requirements
- P25 maintain records according to practice/store requirements

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### Knowledge and understanding

*You need to know and understand:*

#### Forecast and plan to meet expected levels of business

- K1 the practice/store business plan and your area of responsibility within it
- K2 how targets are set
- K3 sources of information on sales and fees
- K4 your product pricing and professional fee structures
- K5 your sales budget
- K6 the competence of the personnel involved
- K7 where to go for advice and information

#### Monitor business performance of the optical practice/store

*You need to know and understand:*

- K8 your sales and other targets
- K9 monitoring techniques
- K10 methods for improving performance
- K11 your own level of authority

#### Monitor optical stock levels

*You need to know and understand:*

- K12 the amount and range of stock held in your practice/store
- K13 your practice's/store's stock plan
- K14 your practice's/store's display plan
- K15 methods of monitoring stock appropriate to the product and your practice/store
- K16 how your practice's/store's stock system works
- K17 how your suppliers' stock systems work
- K18 the legal requirements covering 'use by' dates
- K19 the implications of and how to report shrinkage

#### Maintain optical stock to agreed levels

*You need to know and understand:*

- K20 the amount and range of stock held in your practice/store
- K21 the nature of any anticipated activities and how these affect your stock
- K22 your practice's/store's stock plan
- K23 your practice's/store's display plan
- K24 your sales targets
- K25 how to keep up to date with the latest trends in optical fashion and technology

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- K26 how to order stock
- K27 how your practice's/store's stock system works
- K28 how your suppliers' stock systems work
- K29 your practice's/store's pricing policy
- K30 the legal requirements covering 'use by' dates
- K31 the implications of and how to report shrinkage
- K32 your own level of authority

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### Additional Information

#### External links

This standard links with the following dimension within the NHS Knowledge and Skills Framework (October 2004):

Dimension: G5 Services and project management

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<b>Developed by</b>	Skills for Health
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<b>Status</b>	Original
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<b>Originating organisation</b>	Skills for Health
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<b>Original URN</b>	OPTR14
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<b>Relevant occupations</b>	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
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<b>Suite</b>	Optical Retailing
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<b>Key words</b>	optical, store, practice, requirements
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