# Retailer standard (Level 2) Assessment plan

**January 2017**

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# 1. Introduction

This document sets out the requirements and process for independent end assessment of the retailer apprenticeship standard approved by the Government (Department for Business, Innovation & Skills (BIS). All apprenticeship standards must include independent assessment to check the apprentice's overall performance against the standard.  It is designed for employers, apprentices, education and training providers and assessment organisations.

Independent end assessment occurs when the employer is satisfied that the apprentice is working consistently at or above the level set out in the retailer apprenticeship standard. The assessment period for the retailer standard can commence at any point once the apprentice is competent after the twelve-month minimum period of learning and development.

# 2. Apprentice's readiness for independent end assessment

### i.    Achieving full competence

The period of learning, development and continuous assessment is managed by the employer, in most cases with the service of an education or training provider.  Although learning, development and on-programme assessment is flexible and the process is not prescribed, the following is the recommended baseline expectation for an apprentice to achieve full competence in line with the standard:

*Throughout the period of learning and development, and at least every two months, the apprentice should meet with the on-programme assessor to record their progress against the standard using the on-programme progression template (freely available at People1st.co.uk). At these reviews, evidence should be discussed and recorded by the apprentice. Once the apprentice is deemed competent the relevant section(s) of the standard should be signed off by the on-programme assessor and employer.*

*The maintenance of an on-programme record is important to support the apprentice, on-programme assessor and employer in monitoring the progress of learning and development and to determine when the apprentice has achieved full competence in their job role and is ready for independent end assessment. The on-programme assessment log is NOT a portfolio of evidence, but a record of what the apprentice can do following periods of training, development and assessment. A minimum of six meetings and completed records are recommended, to show ongoing competence across the entire standard, over a minimum of a twelve-month period prior to the starting the independent end assessment.*

Further guidance and support on planning and managing a retailer apprentice's training and development journey is available from the Retail Apprenticeship Board via People1st.co.uk.

### ii.    Readiness for end assessment

The independent end assessment is synoptic, which means it takes an overview of the apprentices' competence.  The end assessment should only commence once the employer is confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard which, as a best practice recommendation, could be clearly evidenced by the on-programme progression meetings and records. The independent end assessment ensures that all apprentices consistently achieve the industry set professional standard for a retailer. Prior to independent end assessment the English and maths components of the apprenticeship must be successfully completed.

A formal meeting will be held and must include the relevant people that have responsibility and accountability for the completion of the apprenticeship, such as: the line manager, on-programme assessor and /or a senior manager as appropriate to the business. It is recommended that the on-programme records, if utilised, are brought to this meeting.  The outcomes of the meeting must be recorded on the readiness for independent end assessment record (freely available from People1st. co.uk) to ensure judgements are appropriate, consistent and fair.

Once the employer (supported by the on-programme assessor) is satisfied that the apprentice has achieved full competence a second meeting must be held that includes an independent end assessor, who must be supplied with the completed record at least one week in advance.  This meeting may be conducted remotely – e.g. a virtual meeting using technology such as Skype, as its aim is to secure the plan for the forthcoming assessment activities, but does not contribute to any assessment decisions.  The independent end assessor will agree a plan and schedule for each assessment activity with the apprentice and employer representative to ensure all components can be completed within a three-month end assessment window.  Assessment organisations must inform

People 1st of the independent end assessments prior to commencement to ensure external quality assurance activity can be planned and implemented.  It should be noted that the on programme assessor is not involved in this planning activity as this forms the next step of the apprenticeship journey, moving from the on-programme phase to the end point assessment.

### iii.    Order and timings of the end assessment
The on demand test must be the first assessment component, followed by the observation and finally the professional discussion.

# 3. Summary of independent end assessment process

The apprentice will be assessed to the apprenticeship standard using three complementary assessment methods. The assessment is synoptic, i.e. takes a view of the overall performance of the apprentice in their job. The assessment activities will be completed in the following order:

**On demand test:**

30 minute on demand multiple choice test

Scenario based questions, , usually taken on screen

Externally set and marked automatically by the assessment organisation

Undertaken either on the employer's premises or off site

Full details located in Annex B

**Practical observation:**

2 hour observation of the apprentice in the workplace by the independent end assessor

Must cover observation of the apprentice's knowledge, skills and behaviours for the Customer, Business, Communication and Brand Reputation elements of the standard. Can also cover wider sections of the standard

Full details located in Annex C

**Professional discussion:**

1 hour structured meeting

Led by the independent end assessor, involving the apprentice and employer (e.g. line manager)

Focusing on how they have performed during the apprenticeship and their overall achievement of the knowledge, skills and behaviours in the standard.

Full details located in Annex D

**Completion:**

Independent end assessor confirms that each assessment element has been completed

The grade is determined by the independent end assessor on the overall performance of the apprentice in the observation and professional discussion:

Pass / Distinction / Fail

# 4. Reliability, validity and consistency

Independent end assessment is a culmination of a learning and development journey resulting in external confirmation of an apprentice meeting the industry defined standard. The assessments are conducted by an independent end assessor approved and appointed by an assessment organisation, which is quality assured to ensure consistent, reliable and valid judgements.

In summary, the following controls must be adhered to:

✓ A formal structure to plan the end point assessment, allowing planning of internal and external quality assurance, including the use of the readiness for independent end assessment record (freely available from People1st.co.uk).

✓ A common approach to assessment tools and procedures for independent end assessment, which will be freely available.  The common approach will help ensure that end assessment tools and procedures are consistent in meeting the requirements for fair, accurate and reliable assessment decisions, against the retailer apprenticeship standard.

✓ The mandating of both technical and assessment competence and continuing professional development (CPD) for independent end assessors to ensure that they have not only the right tools, but the right qualifications, training and experience to make reliable judgements.

✓ An end point assessor from an independent assessment organisation, who has had no prior involvement with the apprentice, providing an objective independent view

✓ The internal quality assurance of individuals conducting independent end assessments and of independent end assessment outcomes and results, by an SFA registered assessment organisation.

✓ Requirements for standardisation of independent end assessments across assessment organisations.

✓ The use of on demand tests with automated marking ensuring a consistent approach regardless of the apprentice's workplace.

✓ Three complementary assessment methods that provide a clear structure for synoptic assessment across the standard.

# 5. Roles and responsibilities

## Independent end assessor

An independent end assessor must be someone who has nothing to gain from the outcome of the assessment and must not have been involved in the training or line management of the apprentice. They must be approved and appointed by the assessment organisation to undertake the independent end assessment of the apprentice.

The employer led approach to end assessment allows assessors to be sourced from the employer's workforce to assess apprentices in their own organisation as long as independence from the apprentice can be demonstrated (i.e. they must not have been involved in either the learning and development or line management of the apprentice). During independent end assessment they are acting on behalf of, and are responsible to, the assessment organisation.

To ensure consistent and reliable judgements are made, independent end assessors will be subject to rigorous quality assurance and must take part in regular standardisation activities. The mandatory criteria for independent end assessors is set out below.

### a) Occupational expertise of retailer independent end assessors

The requirements set out below relate to all retailer independent end assessors. Independent end assessors must:

✓ Have excellent knowledge and understanding of the apprenticeship standard as set out in the industry set Grading Criteria (Annex E).
✓ Hold a recognised current workplace assessment qualification. The list of approved qualifications will be published at www.people1st.co.uk and updated as new, appropriate qualifications are released.
✓ Have current, relevant occupational expertise and knowledge, at the relevant level of the occupational area(s) they are assessing, which has been gained through 'hands on' experience in the industry.
✓ Practice standardised assessment principles set out by the assessment organisation.
✓ Have sufficient resources to carry out the role of independent end assessor i.e. time and budget.

### b) Continuous professional development for retailer independent end assessors

It is necessary for independent end assessors to maintain a record of evidence of their continuous professional development (CPD). This is necessary to ensure currency of skills and understanding of the occupational area(s) being assessed, and can be achieved in a variety of ways. It should be a planned process, reviewed on an annual basis, for example as part of an individual's performance review.

Independent assessors should select CPD methods that are appropriate to meeting their development needs. Within a twelve-month period, an independent end assessor will be required to demonstrate they have gained practical experience in the retail industry which develops/up-dates their knowledge/skills. The following provides an example of a variety of methods that can be utilised for CPD purposes, a multiple of which need to be experienced/undertaken.

### Updating occupational expertise

✓ Internal and external work placements to gain 'hands on' experience

✓ Work experience and shadowing
✓ External visits to other organisations
✓ Updated and new training and qualifications
✓ Training sessions to update skills, techniques and methods
✓ Visits to educational establishments
✓ Trade fairs

## Keeping up to date with sector developments and new legislation

✓ Relevant sector websites and twitter feeds
✓ Membership of professional bodies and trade associations
✓ Papers and documents on legislative change
✓ Seminars, conferences, workshops, membership of committees/working parties
✓ Staff development days

## Standardising and best practice in assessment

✓ Regular standardisation meetings with colleagues (see requirements for standardisation below)
✓ Sharing best practice through internal meetings, news-letters, email circulars, social media
✓ Comparison of assessment and verification in other sectors

## Assessment organisations

Assessment organisations are registered on the SFA Register of apprenticeship assessment organisations. Assessment organisations are responsible for ensuring assessments are conducted fairly and that assessments are valid, reliable and consistent.  It is essential that assessment organisations:

✓ Ensure independent end assessors are competent both vocationally and in assessment
✓ Approve and appoint independent end assessors*
✓ Ensure assessments are planned, communicated and executed fairly
✓ Quality assures independent end assessments
  o With planned internal quality assurance activity
  o Including both desk based and 'live' quality assurance activity
  o This must be performed on a risk basis, i.e. new or poorly performing assessors must have every element of every assessment quality assured, but established, high performing assessors can be quality assured on a sampling basis, with at least one assessment activity being subject to either desk based or live internal quality assurance activity
✓ Ensure on-demand tests are correctly invigilated (Annex B)
✓ Ensure standardisation of all assessors occurs on a regular basis, including but not limited to:

  o Review of annual adherence to CPD requirements
  o Regular standardisation meetings – usually quarterly but required frequency to depend on internal and external quality assurance outcomes of each assessment organisation
  o Assessment and verification training sessions
  o Shadowing and cross checking of other assessors

✓ Address poor performance from assessors to ensure high standards of end assessment
✓ Obtain and review feedback / satisfaction results from apprentices and employers, taking appropriate actions for improvement
✓ Address and administer any appeals and grievances fairly and in line with the consistent approach

Employers wishing to conduct end point assessment, either in their own organisation or for other organisations, must register as an assessment organisation on the Register of Apprentice Assessment Organisations in the same way any assessment organisation is required to do. All assessment organisations are required to check the independence of the end point assessor from the apprentice, ensuring that the end point assessor has not been involved in the learning, development or line management of the apprentice.  All assessment organisations are subject to external quality assurance.  This exception to the standard constraints for end point assessment was granted by the Skills Minister for the retail standards in September 2015

* Where independent end assessors are sourced from the employer's workforce they must be able to demonstrate independence from the apprentice and will act under the remit of the assessment organisation during the period of the assessment.

Assessment organisations will be subject to external quality assurance in order to deliver national consistency across the retail sector which is overseen by the Retail Apprenticeship Board and managed by People 1st.

# 6. External quality assurance (EQA) of the end point assessment for the retail apprenticeship standard

All assessment organisations listed on the Register of Apprentice Assessment Organisations (RoAAO) must follow the external quality assurance process in this plan. The external quality assurance will be overseen by a Retail Apprenticeship Board and conducted and managed by People 1st on a non-profit making basis. Supporting information on the external quality assurance can be found at www.people1st.co.uk.

## Retail Apprenticeship Board

Membership to the Board is via a fair and open public nomination and selection process, with input from key industry, education and training organisations. Membership is open to all types and sizes of businesses, including representation from SMEs and organisations that are new to the apprenticeship process. When a vacancy arises, retail employers are invited to apply for a seat on the board, demonstrating support from at least two industry and/or education and training organisations. Nominees will be judged on their experience, knowledge, qualifications and commitment to ensuring that apprentices consistently achieve the apprenticeship standard. Where a nominee does not immediately secure a place on the board, they will be retained on a list of prospective members for future vacancies.

A Board of 15 members:

- Represent the views of their business and industry networks
- Are subject to re-election after a period of 2 years (requiring the support of two organisations). Re-election is not automatic in order to give opportunities for other employers to be part of the board
- Work openly, challenge, innovate and drive the industry's apprenticeship commitment to quality
- Contribute their specific experience and expertise
- Actively communicate and engage other employers and partners to achieve high quality apprenticeships

The Board also includes a nominated representative from a private training provider, a college and an assessment organisation, whose membership runs for a period of one year before re-election.

In relation to quality the responsibilities of the Board include:

- A full knowledge and understanding of the:
  - o content the retailer assessment plans
  - o external quality assurance arrangements and methodology
  - o infrastructure and processes used to manage and operate the external quality assurance

- Agreeing measures to benchmark external quality assurance results set by People 1st
- Overseeing external quality assurance results based on the provision of quarterly reports provided by People 1st and agreeing corrective action as necessary
- Working collaboratively with training providers and assessment organisations, to identify and address matters relating to the external quality assurance process and results
- Reviewing evaluation results to ensure that the retailer apprenticeship remains fit for purpose and advising on matters of maintenance which may impact on external quality assurance
- Reviewing and addressing complaints against retailer apprenticeship and external quality assurance results

## Process for initiating external quality assurance

Once an employer is confident that an apprentice has consistently reached full competence against the knowledge, skills and behaviours in the apprenticeship standard they will contact an independent end assessment organisation.  In order to start the external quality assurance process, the assessment organisation will notify People 1st online at www.people1st.co.uk.

External quality assurance visits will be completed regularly on each assessment organisation, and may include more than one visit/activity where an assessment organisation operates in more than one region, or uses multiple assessment centres.  External quality assurance will comprise a range of activities, examples of which are detailed below and will include onsite visits to assessment organisations.

## External quality assurance activities

External quality assurance will focus on four defined areas to ensure compliance, including: consistency of assessment materials, competence and performance of staff, the internal quality assurance checks and the overall planning and reporting of the apprenticeship end point assessment process.

- **Ensuring consistency of assessment materials**
    - o    Design of the assessment materials
    - o    Consistent application and internal quality assurance of assessment materials during end point assessments
- **Competence of staff – EQA activity will check**
    - o    Vocational competence of assessment and internal verification staff
    - o    That assessment and internal quality assurance staff have been trained on end point assessment for the retailer standard
    - o    That Continuous Professional Development of both vocational and assessment competence is occurring to the prescribed standard
- **Internal quality assurance – EQA activity will check**
    - o    Independent Assessment Organisations have implemented internal quality assurance procedures as set out in the assessment plan
- **Reporting and management of information – EQA activity will check**
    - o    Timely and accurate registration of the apprentice and notification of results
    - o    Accuracy of internal data against registrations in the People 1st system
    - o    Full, accurate and legible records

## Sampling size and frequency

An assessment organisation's sample size will vary due to a number of considerations.  Each assessment 'centre' (i.e. if an assessment organisation provides remote centres or operates multiple teams of assessors) will be sampled regularly.  The baseline sample for the first external quality assurance visit will be 10%.  At the end of each EQA visit the assessment organisation's performance will be graded (e.g. excellent, adequate, poor) and future EQA activity levels will be planned accordingly.  Assessment organisations receiving excellent EQA results can expect future samples to be less than 10% and assessment organisations receiving poor EQA results can expect increased frequency of activity and size of EQA sample. At each EQA visit the sample required will include:

- Apprentices who are currently in the assessment window and those who have completed their end point assessment since the previous full external quality assurance visit
- Assessment centres conducting end point assessments on multiple linked standards (i.e. retailer, retail team leader and retail manager) may have external quality assurance activity combined for efficiency.

It is expected that EQA activity will typically occur every six months, but this frequency may be adjusted in accordance with the volume of apprentices completing end point assessment and the past performance of the assessment organisation.

Prior to an external quality assurance visit, assessment organisations will be contacted to provide and confirm relevant information regarding apprentices. From this information a sample will be selected and names of apprentices for whom evidence and activity are to be quality assured will be notified to the assessment organisation prior to the visit.

Typically, an external quality assurance visit will involve:

- Meetings between the external quality assurance personnel and apprentices, assessors and internal quality assurance staff.
- A desk review of assessment documentation, covering each assessment activity and usually covering a range of results from distinction through to fail, validating the internal quality assurance activity.
- Review of records relating to the planning of internal quality assurance and feedback from end point assessments.
- Review of records relating to the multiple choice test administration.
- Review of records relating to appeals and grievances.
- Review of competence and CPD for assessment and internal quality assurance staff.
- Review evidence of satisfaction measures for apprentices and employers.
- External quality assurance activity will normally include an opportunity to observe part of a practical assessment, professional discussion or conduct of an examination. All three forms of assessment will be observed over time during the course of external quality assurance visits.

## Reporting and recommendations

Within 15 working days after the visit a draft report will be supplied to the independent assessment organisation, including recommendations, actions and a provisional risk grading. The assessment organisation will be given a further 15 working days to provide any feedback, as necessary, after which the final edition of the report, including final grade, will be sent to them.

Subsequent external quality assurance activity will be appropriate to the findings, recommendations and actions and may include interim EQA activity prior to the next full visit.

The EQA reports will not be made publically available, but may be shared, in whole or in part, with the employers on the Retail Apprenticeship Board to inform evaluations and improvements. Identifying information will be removed so that board members cannot identify the assessment organisation.

# 7. Grading

The apprenticeship includes Pass and Distinction grades with the final grade based on the apprentice's combined performance in the observation and professional discussion independent assessment activities in accordance with the detailed criteria in Annex E.

**In order to pass:**

In the **on demand test** the apprentice must achieve the correct percentage of correct answers to pass the assessment activity. The on demand test will feature a sample of questions, based on a representative sample of the assessment criteria in Annex E(i)

In the **observation** the apprentice must demonstrate competence against **all** of the assessment criteria in Annex E(ii), and any naturally occurring opportunities to cover the assessment criteria in Annex E(iii) should be taken. Any assessment criteria in Annex E(iii) not covered in the observation need to be covered in the professional discussion. This is because any given day and time in a retail environment is unpredictable and the assessment has been designed to be flexible so as not to disadvantage an apprentice due to levels of trade, excepting no trade, on any given day.

In the **professional discussion** the apprentice must demonstrate competence against **all** of the assessment criteria in Annex E(iv), plus any assessment criteria in Annex E(iii) that were not covered in the observation.

**In order to achieve a distinction:**

In addition to demonstrating competence across all of the assessment criteria to achieve a pass, apprentices can also achieve a distinction grade by demonstrating competence against **all** of the assessment criteria in Annex E(v). This competence can be demonstrated over the course of the **observation** and **professional discussion**, allowing the best use of naturally occurring evidence if available during the observation but allowing the apprentice the opportunity to demonstrate their competence in the professional discussion if required.

The final overall grade will be based on the combined performance in the practical observation and professional discussion.

The independent end assessor will be notified of successful completion of the on demand test (results of which will usually be computer generated and validated by the assessment organisation, or if not computer generated but paper based, must use automated marking by the assessment organisation and results notified), and then aggregate performance to determine the overall assessment outcome of not achieved, pass or distinction using a clearly defined, evidence-based process as prescribed by the assessment organisation.

Should an apprentice fail one assessment activity this should be retaken as soon as the apprentice is ready and when practicable for the business. Should they fail two or more activities a period of further training and development lasting between one and three months must take place before a resit. A maximum of two resits per assessment activity will be permitted. When retaking an assessment activity, the maximum grade that can be achieved for that activity is a pass.

# 8. Affordability

It is anticipated that the end point assessment will cost approximately 15-18% of the total available funding for the retailer standard, based on a 2015/16 cap 2 allocation.

# Annex A – Assessment method by element of the retailer standard

The main purpose of a retailer is to assist customers when they purchase products and services, which requires a good understanding of the stock being sold, the variety of ways customers can shop and the ability to process payments, for example, using a till. Retailers must be passionate about delivering a quality service that always aims to exceed customers' expectations. Therefore, retailers enjoy direct contact with a wide range of people and are motivated by completing a sale and knowing a customer is happy with their purchase. They can work in a variety of shops and other retail establishments: small boutiques, large high street chains, supermarkets and well-known department stores are just some examples. More specialist retailers include funeral services, garden centres, delicatessens and people who work in remote environments for example in telephone, on-line and mail order retail. Regardless of the type of products and services being sold, a wide representation of employers from across the retail industry have defined this standard and agreed that the knowledge, skills and behaviours that apprentices must have to do their job are the same.

| Key to assessment method indentification | |
|---|---|
| IEA | Independent End Assessment activity – identifies which assessment method will be used for that section of the standard.. This chart provides an overview of what an apprentice can expect to be covered in each assessment method, but the detailed assessment criteria that must be met can be found in Annex F |
| T | Assessment will be through the on demand test |
| O | Assessment will be through the observation |
| PO | Assessment will be through the professional discussion |
| 2 methods | Some sections of the standard are assessed by more than one method.  Specific assessment criteria are set against assessment activities in Annex E |

| | Knowledge and Understanding (Know it) | IEA | Skills (Show it) | IEA | Behaviours (Live it) | IEA |
|---|---|---|---|---|---|---|
| Customer | Know the customer profile of the business, appropriate methods for communicating with customers  e.g. face to face and remotely, what customers' purchasing habits are, how to support and increase sales, encourage customer loyalty and achieve repeat business | PD | Positively interact with customers, using business relevant methods for example face to face or on-line, to support and increase sales by providing useful information and service | O | Adopt an approachable and friendly manner, interacting with customers in line with the style of the business, showing a genuine interest in meeting their needs and actively seeking feedback to improve own quality of service provision | O |
| Business | Know the vision, objectives and brand standards of the business and how to contribute towards their success | PD | Establish a good rapport with customers, serve them in line with brand standards and promote the values of the business in all work activities | O | Demonstrate personal drive and a positive regard for the reputation and aim of the business | PD |

| Financial | Understand the principles of operating commercially and supporting the overall financial performance of the business for example by aiming to exceed targeted sales and reduce wastage and returns | T | Deliver a sales service that meets customers' needs and balances the financial performance of the business for example working towards sales targets, following procedures relating to packing of goods and dealing with returned products | O/ AD | Act credibly and with integrity on all matters that affect financial performance | PD |
|---|---|---|---|---|---|---|
| Marketing | Know how the business positions itself in order to increase its market share and compete against its main competitors for example its unique selling points, its straplines, promotions and advertising campaigns | PD | Influence customers' purchasing decisions by providing accurate guidance on product and price comparisons and sharing knowledge on local offers and variances | O/ AD | Take an interest in the position of the business within the wider industry | PD |
| Communications | Know how to identify and determine individuals' situation and needs and how to respond in the most appropriate way in line with the business culture (for example the difference in how a branded goods retailer would communicate to their customers would be very different from an individual that retails a funeral service, or someone that needs to convey highly technical product information) | PD | Use effective methods of communication that achieve the desired result, according to the purchasing process e.g. face to face, via the telephone or on-line | O/T | Take a positive interest in customers, actively listening or taking due care to understand written or on-line communications and respond appropriately | O |
| Sales and Promotion | Understand the sales opportunities that exist across the year within the business and industry and the need to know customers' buying habits during these periods, seasonal product / service knowledge, and stock requirements at different times of the year | PD | Use a variety of sales techniques when providing customers with information that are appropriate to the business and actively sell the benefits of seasonal offers for example, through in-store or on-line promotions | O/ PD | Pro-actively seek ways of enhancing sales whilst being sensitive to the needs of the customer and encourage team members to do the same | PD |
| Product and service | Know information on the brands, products and services as required by the business (for example in large retailers a general knowledge of a range of products and services may be needed, but in specialist outlets a detailed knowledge on the technical specification of a product and the aftercare service may be necessary) | O/ PD | Help match products and services to customers' needs and increase the amount they spend for example through the sale of associated products and services | PD/ O | Confidently demonstrate a belief in the products and services the business offers | O/ PD |
| Brand reputation | Know and understand the importance of brand and business reputation and what can affect it | T | Respond to situations that threaten brand and business reputation in line with company policy and alert the relevant person if a threat is identified | PD | Uphold and personally demonstrate a positive brand and business reputation at all times | P |
| Merchandising | Understand how to increase sales through product placement by utilising 'hot spots' and recognising the relationship between sales and space | T | Actively use techniques to optimise sales through effective product placement, ensuring product displays remain attractive, appealing and safe to customers | O / PD | Make recommendations for merchandising as necessary to enhance sales and customer satisfaction | |

| | | | | | | |
|---|---|---|---|---|---|---|
| Stock | Know how to maintain appropriate levels of the right stock to meet customer demand, taking into account planned marketing activities and expected seasonal variations and the conditions they must be stored in | T/ O/ PD | Maintain appropriate levels of the right stock to meet customer demand, ensure it is kept in the correct condition (for example correct temperature, environment, packaging), and minimise stock loss through accurate administration, minimising wastage and theft | T/ O/ PD | Take ownership and responsibility to identify stock issues and take action to address them | PD |
| Technical | Know how to operate technology such as customer payments and understand how changing technology, for example social media, digital and multichannel tools, support the sale of products and facilitates an effective and efficient service to customers | O/T | Use technology appropriately and efficiently in line with company policy, to support sales and service ensuring that maintenance issues are dealt with promptly | O/ PD | Embrace the use of technology, use it responsibly and take an interest in new developments, for example in social media, that could support the business | PD |
| Team | Know how to support and influence the team positively, recognising how all colleagues and teams are dependent on each other to meet business objectives | PD | Support team members to ensure that the services provided are of a high quality, delivered on time and as required | O | Demonstrate pride in own role through a consistently positive and professional approach, and be aware of the impact of personal behaviour within the team | PD |
| Performance | Understand how personal performance contributes to the success of the business for example the sale of products and services, increasing sales and achieving customer loyalty | PD | Challenge personal methods of working and actively implement improvements | PD | Take responsibility for own performance, learning and development, striving to accomplish the best results and take a flexible and adaptable approach to work | PD |
| Legal and goverance | Recognise and understand legislative responsibilities relating to the business and the products and/or services being sold (for example the importance of food safety for food retailers), the importance of protecting peoples' health, safety and security, and the consequences of not following legal guidelines | T | Comply with legal requirements to minimise risk and inspire customer confidence; minimising  disruption to the business and maintaining the safety and security of people at all times | O/ PD | Work with integrity in an honest and trustworthy manner putting personal safety and that of others first | O/ PD |
| Diversity | Understand how to work with people from a wide range of backgrounds and cultures and recognise how local demographics can impact on the product range of the business | PD | Put people at ease in all matters helping them to feel welcome and supported and provide them with information that is relevant to their needs | O/ PD | Operate in an empathic, fair and professional manner | O/ PD |
| Environment | Know how to take responsible decisions to minimise negative effects on the environment in all work activities | T | Minimise the effect of work activities on the environment through managing wastage and loss according to business procedures | T | Demonstrate personal commitment to minimising the effect of work activities on the environment and make recommendations for improvement if identified | PD |

# Annex B: On demand test specification

Key facts:

✓      30 minute on demand multiple choice test
✓      Scenario based questions
✓      Externally set and marked
✓      Undertaken either on the employer's premises or off site

The assessment will be an objective on demand test and will be in multiple-choice format ensuring validity and reliability and which allows for consistent, efficient and timely allocation of marks / grades. It is expected that the on demand tests will be on-screen and computer marked, with validated results notified to the independent end assessor. If on demand tests are paper based, they must be sent back to the assessment organisation for automated marking and the independent end assessor will be notified of the results. The question banks will cover the knowledge and skills identified on the standard (Annex A). Some questions will require the apprentice to consider a course of action or solution to a situation / problem based on a 'real-life' workplace activity in line with the identified requirements of the standard. The questions will be scenario based requiring the apprentice to demonstrate reasoning and joined up thinking, demonstrating synoptic performance against the key elements of the standard. The 30-minute test will include questions covering a representative sample of the grading criteria identified in Annex E.

Apprentices will complete their tests on-screen unless individual assessment needs dictate a suitable alternative method, such as paper based, away from the day to day pressures of work and in a 'controlled' environment, which may be on or off the employers' premises.

## Assessment Organisations

The assessment organisation will identify a suitable person to invigilate the on demand test. As this test is externally set and marked it may be invigilated by the on-programme assessor, alternatively it may, but does not have to be, the assessor conducting the observation and professional discussion. Tests will be invigilated in line with the requirements set out by the assessment organisation.

Test specifications will be available from People1st.co.uk and all assessment organisation must comply with the common approach contained therein.

Questions will be written using the language, tone and style expected for the level of standard. Apprentices taking the tests will be given a proportional sample of these questions which reflect general coverage of the standards to demonstrate competence within the given time constraints. Test specifications will include a clear rationale for pass level.

The definition of a 'controlled environment' will be clearly defined and explained by the assessment organisations prior to scheduling the test and will include environmental requirements such as lighting, space, privacy and the requirements for an invigilator to follow a best practice process.

# Annex C: Practical observation specification

Key facts:

- ✓ 2-hour observation of the apprentice in the workplace
- ✓ Must include observation of Customer, Business, Communication and Brand reputation elements of the standard
- ✓ Will also include additional areas of the standard, but any not identified will be assessed in the subsequent professional discussion
- ✓ Must maximise the apprentice's opportunity to demonstrate competence, e.g. moving to another area of the business to perform a different part of the job role

This assessment brings together all aspects of the standard, as identified in Annex A. The practical assessment is an observation of the apprentice in the retail environment and must include customer interaction. During the two hour observation the apprentice should have the opportunity, if required to move from one area / function of the business to another in order to best demonstrate how they have applied their knowledge, skills and behaviours in a real-work environment to achieve genuine and demanding work objectives.

It is mandatory that the observation covers the customer, business, communication, brand reputation aspects of the standard. The observation is likely to also cover other aspects of the standard (as referenced in Annex A) through naturally occurring opportunities.

The practical observation provides the opportunity for substantial synoptic assessment against the relevant elements of the standard. The observation must be scheduled when the apprentice will be working in their normal place of work and will also:

- ✓ Be conducted at a time which reflects typical working conditions and avoids seasonal periods of low levels of trading
- ✓ Allow the apprentice to demonstrate all aspects of the standard being observed
  (e.g. the apprentice must interact with customers when being assessed for customer service)
- ✓ Take a synoptic approach to observing the overall competence

The independent end assessor will plan the observation in conjunction with the apprentice and employer following the detailed specification available from People1st.co.uk, which will be subject to internal and external quality assurance. The observation must be carried out in one session, except in exceptional circumstances (such as a business operating different functions across two sites), requirements for which will form part of the assessment tools and procedures prescribed in the test specification. Observations must be planned in advance to allow for quality assurance activity.

It is recognised that in a small number of retail environments, such as betting shops or funeral directors, an independent end assessor may have an adverse impact on customer behaviour and therefore the retail operation.  In such operations, should the method described above not be feasible the independent end assessor must propose an alternative method to People 1st who will advise on the most appropriate course of action.  This may, for example, include the independent end assessor observing whilst posing as a customer or other member of the team and utilising additional information through audio or visual recordings and witness testimony.

The grading criteria for all assessment activities are contained in Annex E.

For retailers working in a remote environment, such as in telephone, on-line and mail order retail it is recognised that opportunities to merchandise, particularly if selling a utility or service rather than a product, may be limited. In these instances the minimum observation requirements for

merchandising do not need to be met; however the apprentice must have gained the skills, knowledge and behaviour through their programme of learning and development, which may be obtained in a simulated environment.  This inclusion ensures consistent coverage of the whole standard and aids the apprentice should they transfer to an onsite retail environment in the future. The end point assessment will then incorporate merchandising into the professional discussion to assess the apprentice's competence in this area, it is not required as part of the observation.

# Annex D: Professional discussion specification

Key facts:

✓ 1-hour discussion between the apprentice and the independent end assessor
✓ Employer present to support (but not lead) the apprentice and confirm information
✓ Will include areas of the standard not seen in the observation plus key additional areas dentified in Annex A
✓ Planned in advance to allow the apprentice to prepare fully for the discussion

The professional discussion is a structured discussion between the apprentice and their independent end assessor. The employer will be present at this discussion to provide further examples and support (but not lead) the apprentice.  The employer does not score the discussion.  The independent end assessor conducting the professional discussion should normally be the same person who conducted the observation.  It allows the independent end assessor to ask the apprentice questions in relation to:

✓ The period of learning, development and continuous assessment
✓ Coverage of the standard
✓ Personal development and reflection

The apprentice will be informed of the requirements prior to the discussion at least five days in advance and may bring materials to assist them to demonstrate their competence.  The discussion must be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence.

The professional discussion will be conducted in a 'controlled environment' i.e. a quiet room, away from the normal place of work.  If for any reason it is not possible for all involved to meet in the same place end assessors must ensure adequate controls are in place to maintain fair and accurate assessment. The professional discussion may be conducted using technology such as video link, as long as fair assessment conditions can be maintained. Acceptable means of remote assessment include video conferencing / video calling and must include a two way visual and audio link.  A standard template, provided as part of the detailed specification available from People1st.co.uk, which can be contextualised will be used, to ensure that standards are secure but interviewers are able to focus on key areas for confirmation of performance and effective appraisal of the evidence base. This will ensure that consistent approaches are taken and that all key areas are appropriately explored. The professional discussion will be planned in advance to allow for quality assurance activity in line with sampling requirements and will cover the key elements of the standard identified in Annex A.

The professional discussion will recognise areas which have already been covered in the observation so as not to re-assess an area in which the apprentice has already demonstrated competence.  The professional discussion will typically last one hour and will be scored by the independent assessor using the standard template. The template will record full details of all marks applied (and evidence referenced) by the assessor.

For retailers working in a remote environment, such as in telephone, on-line and mail order retail it is recognised that opportunities to control physical stock items and storage areas, particularly if selling a utility or service rather than a product, may be limited.  All apprentices must have a full knowledge and understanding of stock as detailed in the apprenticeship standard and how this applies within their environment; however specific assessment criteria, listed under the 'stock' element of Annex E(iv) can be discussed and competence ascertained through theoretical discussion rather than workplace examples.

# Annex E: Grading criteria

| Annex E (I) | In order to pass all apprentices will demonstrate a representative sample of the following in the on demand test |
|---|---|
| Financial | • General principles of operating commercially in the retail environment<br>• What costs are (the cost of all resources including for example: stock, packaging items, stationery, time, etc.)<br>• How a different approach to just one process that does not affect great customer service can save the business money (e.g. the use packaging material)<br>• Key performance indicators that support the profitability of the business<br>• The sales targets for the business and how businesses aim to reduce waste<br>• Where and when wastage can occur and how to minimise it (e.g. reducing the rate of returned goods)<br>• Techniques and opportunities for increasing sales in the business at the lowest cost (e.g. time invested into achieving the sale) |
| Communications | • Why excellent communication is so important to businesses<br>• The impact on businesses of poor or inappropriate communication<br>• The impact of body language in communication<br>• The importance of non-judgemental listening in the communication process<br>• A variety of communication methods to deal with different situations |
| Brand reputation | • The link between brand reputation and business success<br>• Understand how conduct both during and out of working hours can impact on brand and business reputation (including use of social media)<br>• Recognise how own actions impact on brand reputation both positively and negatively |
| Merchandising | • Recognise the importance of window and store displays in translating brand or business identity to customers<br>• The implications of misrepresentation of or damage to the product through excessive alteration in merchandising<br>• How merchandising can support the sales process |
| Stock | • Recognise the importance of ensuring the right level of stock in the business, stock control and understand the implications of poor stock control in the business<br>• How to keep accurate stock records and why this is important to ensuring the right levels of stock are maintained<br>• Why security is important when storing stock |
| Marketing | • What 'business positioning' is and how it relates to market share and competitors<br>• What a unique selling point is, how businesses benefit from them<br>• What a promotions and advertising campaign is and why businesses use them<br>• How methods used for promotion impact on the customer's purchasing decision<br>• The importance of being aware of local competitors and their offers<br>• What a strapline is and how it is used |

| Legal and governance | • How consumer legislation protects the rights of customers<br>• How consumers are protected from unfair trading practices<br>• The main requirements of consumer credit, data protection, weights and measures, licensing and age-related legislation, how they protect consumers and how they impact the business<br>• The main requirements of legislation in relation to health, safety, security and confidentiality<br>• How to identify and assess risks to health, safety and security<br>• How to work safely and how to deal with risks, accidents and emergencies<br>• The legal and commercial implications to the business of contravening legislation<br>• Own role and responsibilities in relation to complying with legal requirements |
|---|---|
| Environment | • The main environmental matters that have implications for businesses and if there are any that have particular relevance for the local business community<br>• How work activities impact on the environment |

| Annex E (ii) | In order to pass all apprentices will demonstrate ALL of the following during the observation: |
|---|---|
| Customer | • Make every interaction with a customer an opportunity to increase, gain, maintain or re-establish their loyalty<br>• Clearly communicate accurate, relevant and helpful information to customers, checking their understanding<br>• Deliver excellent customer service in line with the business' culture and values in all activities<br>• Ask appropriate questions in order to help customers<br>• Shows a genuine interest in customer service which clearly demonstrates understanding of how own behaviour will influence customers' opinion of the business, their purchasing decision, and ultimately overall profitability<br>• Present the culture of the organisation through own personal presentation and interaction with customers |
| Business | • Interact with customers and build a rapport in a way that demonstrates an understanding of the business vision, objectives and brand standards<br>• Use service techniques and procedures that deliver the brand standards<br>• Carry out all activities in a manner that promotes the value of the business brand standards to customers, team members and other stakeholders (e.g. suppliers) |
| Communications | • Communicate with an awareness of the situation, adapting it as necessary, and responding appropriately<br>• Support customer interactions by adapting body language and tone to the person / people being served |
| Brand reputation | • Uphold and personally demonstrate a positive brand and business reputation at all times |

| Annex E (iii) | In addition to the above apprentices must demonstrate ALL of the following EITHER during the observation OR evidence competence as part of the professional discussion to achieve a pass overall |
|---|---|
| Customer | • Use the business offer to support efforts to enhance customer loyalty (e.g. from a friendly, helpful attitude to formalised reward schemes)<br>• Utilise understanding of customer profiles by quickly identifying what the customer needs and offering options that will meet or exceed their expectations<br>• Listen to and deal with customers' questions, queries and complaints effectively in line with business requirements<br>• Use methods of communication and rapport building that are in line with the business and adapt accordingly to different customers<br>• Take a positive approach to receiving feedback and learn from the experience to improve own customer service offer |
| Communications | • Use a range of communication styles according to the person being communicated to<br>• The typical style and methods of communication used by the business<br>• Demonstrate empathy for the person being communicated with<br>• Has an awareness of own communication style and how to manage it depending on the circumstances |
| Financial | • Use methods that will enhance sales and reduce costs for the business whilst delivering great customer service<br>• Use methods of financial control that are appropriate to the style of the business<br>• Use methods of work that will meet or exceed financial targets<br>• Deal with matters of financial loss (e.g. wastage, returned goods) in a manner that minimises further loss, but in accordance to the requirements of the business<br>• Handles matters appropriately to minimise the risk of financial loss (e.g. bad customer service can lead to additional costs and handling stock inappropriately can lead to damage and wastage)<br>• Acts responsibly and sensibly to reduce waste (e.g. looks for opportunities to reduce waste but doesn't take inappropriate risks that will compromise customer service) |
| Marketing | • Use accurate information to explain product and service offers (e.g. the period the offer / promotion is available for), and price comparisons to customers<br>• Select best method of promoting a product or service to support business objectives<br>• Take every opportunity to promote the unique selling point of the business and or its products / services<br>• Openly share knowledge with colleagues and customers |
| Sales and Promotion | • Selects and uses a range of selling techniques appropriate to situation, product and/or service being sold<br>• Talks to customers to identify sales opportunities<br>• Takes opportunities to increase the size of the sale (e.g. basket size, promoting offers and bi-products)<br>• Actively sells without intimidating or pressurising the customer |

| Product and service | • The importance of up to date product / service knowledge |
| --- | --- |
| | • Where to identify product / service knowledge |
| | • Key facts of product / service knowledge needed to support and complete sales |
| | • The importance of identifying customer needs in order to sell products and services that will meet and /or exceed their expectations |
| | • How to link product features and benefits to customer needs and profile |
| | • How to keep up to date on business brands, products and services e.g. notice boards; internal newsletters; intranet; team briefings |
| | • If and how the product fits into a wider range of products and the differences / links between them |
| | • Ask customers questions about the products / services they are looking for and the features and benefits that will meet or exceed their needs |
| | • Identify products / services which match customer requirements |
| | • Discuss relevant options, giving customers opportunities to ask questions and clarify information |
| | • Close the sale with the customer, confirming what they want to buy and provide relevant information e.g.  any relevant customer rights |
| | • Decide if it is appropriate to sell additional bi products / services to the customer and highlight them accordingly |
| | • Displays energy and motivation |
| | • Has pride in the delivery of products and services |
| Merchandising | • Identify key areas to achieve maximum visual impact and create a display area that optimises the merchandise; props and materials and is aesthetically pleasing |
| | • Collect and style required stock for display for maximum effect to enhance the theme, support the merchandise and communicate effectively with the target market(s) |
| | • Select and place all merchandising material, in an effective composition to support the branding of the merchandise and communicate effectively with the target market(s) |
| | • Follow business guidelines for displaying stock |
| | • Conduct checks to ensure the display result is safe, neat and tidy, clean, finished on time and in line with business expectations |
| | • Maintain the display area so that at all time its presentation is in line with business expectations |
| | • Evaluate the effectiveness of the window display in supporting the intended merchandise and brand |
| | • Analyse feedback and respond appropriately making suggestions for improvements |
| | • Listen, reflect and respond positively and constructively to feedback |
| Technical | • Identify types of technology and their uses in different types of business operation |
| | • Identify technology and its uses within the business |
| | • How technology supports the effective and efficient sale of products and services to customers |
| | • How to use relevant technology correctly |
| | • Identify the technology in the work environment and use it efficiently and effectively |
| | • Know what to do when technology fails |

| | |
|---|---|
| | • Strictly follow instructions and procedures, including safety, when using technology<br>• Use technology safely and appropriately<br>• Take action quickly and decisively when issues occur |
| **Team** | • Balance own priorities / work objectives at the same time as supporting team members as agreed<br>• Keep team members informed on the progress towards joint tasks<br>• Determine when and how to communicate matters that have implications on the business e.g. relating to service, safety and quality<br>• Share knowledge and information with team members, selecting the appropriate communication method and time of day<br>• Adapt communication according to the team member(s) being communicated to (e.g. distinguishing between new members of staff, colleagues at the same level and senior level staff)<br>• Effectively participate in briefings / meetings, actively listening and asking questions to confirm understanding |
| **Legal and governance** | • Maintain the confidentiality and security of customer data when recording, retaining and sharing information<br>• Follow business health and safety procedures when carrying out work activities<br>• Follow business procedures to comply with consumer protection law<br>• Identify health, safety and security risks and minimise, deal with or report to the appropriate person in line with own limits of authority<br>• Deal with accidents and emergencies calmly and in line with business procedures<br>• Promote a safe and secure working environment through setting an example to others |
| **Diversity** | • Use a range of communication styles to suit the person you are talking to<br>• Adapt communication in different contexts<br>• Make enough time and effort and respond flexibly and positively so that own working practice engages all customers<br>• Seek clarification and manage situations<br>• Use techniques to minimise misunderstanding and improve communication<br>• Demonstrate fairness and integrity in all work activities<br>• Display empathy towards others |
| **Environment** | • Carry out all work activities following the principles and / or procedures of the business e.g. when stock should be disposed of and in what manner; method of carrying out service activities to minimise waste<br>• Monitor stock/resources (and where relevant equipment that stock is contained within) as required by the business to ensure it maintains its quality<br>• Deliver service in a manner that minimises overall waste but is always in the best interest of the customer<br>• Follow business requirements to identify and record the causes of wastage<br>• Take measures to prevent wastage |

| Annex E (iv) | In order to pass all apprentices will demonstrate ALL of the following during the professional discussion: |
|---|---|
| Customer | • The key features and benefits of excellent customer service as defined by the business and in contrast to other businesses in the industry<br>• The importance of excellent customer service to business success and the implications of poor customer service<br>• The importance of repeat business and ways to encourage customer loyalty in the retail industry<br>• What is meant by a 'customer experience'<br>• Where to find information on customers within the business<br>• Typical customer profile(s) – i.e. who the target customers of the business are and the products/services that they typically purchase<br>• An appreciation of different types of customer, their motivation to purchase products/service and their different needs<br>• The unique needs of certain customers and how to help them in line with business procedures and environment (e.g. helping a mother with a buggy in a small shop, or a person with a disability)<br>• How to recognise and adapt approach to different customer behaviours, emotions and emotive needs (i.e. the needs of customers purchasing a funeral care service will be very different from purchasing a new family car, or a customer having to work on a tight budget)<br>• Different methods customers want to use to purchase products e.g. in-store, orders, on-line and how to make it a positive experience<br>• How customers' purchasing habits are influenced through social trends and the media<br>• How the culture of different businesses impacts on the style of interaction with customers |
| Business | • Where to identify the vision, objectives and brand standard / style of the business<br>• The purpose of a vision statement, the benefits to the business as a whole and how it impacts on own role<br>• The purpose of setting objectives and why they are important for businesses to be successful<br>• How objectives relate to own role in the business<br>• The importance of the business brand standards, in relation to the product and/or services it offers<br>• Positively presents the business brand standards in all communications with customers<br>• Has a conscientious attitude to deliver brand standards and protecting the reputation of the business, for example always following service expectations or procedures<br>• Operates in an accountable manner taking ownership for own actions and their implications on the business |
| Marketing | • What the unique selling point of the business is and how it compares to other organisations<br>• How businesses are positioned in the wider market alongside competitors<br>• How to promote products and services to achieve business objectives<br>• Where in the business to find the latest guidance and information on promotions and advertising campaigns<br>• How the business compares with its competitors in terms of product offer, pricing and service |

| Sales and Promotion | • How sales targets differ according to the retail calendar<br>• Own contribution to meeting sales targets<br>• Different selling techniques and how and when to use them |
|---|---|
| Brand reputation | • Deal with relevant situations that may affect brand reputation in line with company policy |
| Stock | • Check storage areas are clean, tidy and have sufficient space for stock being delivered and deal with in line with business procedures if not<br>• Check delivery or holding areas are clean and tidy and necessary unloading equipment is available and in working order<br>• Check stock on delivery to make sure it is of the correct type, quantity and quality ordered<br>• Deal with incorrect type or quantities, faulty or substandard stock in line with business procedures<br>• Manage stock and carry out correct rotation procedures to maintain quality and prevent loss, damage or deterioration<br>• Complete all paperwork and records accurately and clearly in line with business requirements<br>• Follow the business requirements for the security of the storage of stock<br>• Has the confidence to return incorrect, faulty or substandard goods<br>• Takes a calm and considered approach when issues occur, minimising the risk or disruption caused |
| Technical | • Takes action quickly and decisively when issues occur |
| Team | • What makes an effective team and what is meant by team dynamics<br>• Ways in which team members / teams work together, interact and provide supports to each other to meet business objectives<br>• The implications when team members do not work together<br>• Different methods, including the use of effective negotiation, to positively influence a team<br>• The importance of positive listening, valuing difference of opinion and challenges in order to reach suitable agreements / actions<br>• The roles and responsibilities of team members<br>• The information and resources that colleagues may need and where to obtain it if not known<br>• The importance of fulfilling agreements made with team members or keeping them informed if there is a problem<br>• Build effective working relationships with all team members<br>• Set an example to others through a professional and positive approach to all work activities<br>• Strengthen team dynamics e.g. by demonstrating a personal commitment to excellent work ethics e.g. time keeping, fulfilling agreements, taking a fair approach<br>• Demonstrate an interest in other team members' roles and how they relate to own<br>• Take a positive approach to helping team members to support the business, offering help to busy team members where possible<br>• Co-operate with team members at all levels<br>• Actively support other team members' learning |

| Performance | • How work objectives are agreed and recognise the benefits they can bring to the individual and the business<br>• How own roles and responsibilities impact on team goals<br>• The benefits to the business of more effective ways of working<br>• The benefits of performance improvement to the individual and business<br>• The benefits of a personal development plan<br>• How to identify own learning needs and improve own performance and identify<br>• Demonstrate drive and commitment<br>• Take ownership for own performance and personal development |
|---|---|
| Diversity | • Different diverse cultures and backgrounds dependent on local demographics of the business<br>• Implications of relevant diversity and equality legislation<br>• Understand the importance of and how to follow policy in relation to equality and diversity<br>• What local demographics mean in relation to the business products and services<br>• The importance of understanding customers and local demographics to business success<br>• Identify how to listen in a non-judgemental manner<br>• How own use of language, body language, gestures and tone of voice may appear to customers and colleagues; and how theirs may affect your perceptions of them<br>• How to contextualise conversations |
| Environment | • Actively promotes environmental initiatives /projects in the business<br>• Sets an example to others by working responsibility and efficiently to avoid waste, encouraging team members to do the same<br>• Take opportunities to use more environmentally aware methods in all work activities<br>• The purpose and process of waste control and stock taking requirements of the business<br>• The re-using and re-cycling expectations within the business and why these are important<br>• The principles or policies of the business relating to the environment and why it's important to follow them |

| Annex E (v) | In addition to demonstrating all pass criteria have been achieved, apprentices must demonstrate ALL of the following EITHER during the observation OR evidence competence as part of the professional discussion to achieve a distinction overall |
|---|---|
| Customer | • Go beyond customers' expectations giving at least one example: how, what here when e.g. turned a complaint into an opportunity to retain customer<br>• Uses initiative to improve sales and/or customer service |
| Business | • Consistent representation of the business values<br>• Being proud and passionate as a brand ambassador |
| Brand reputation | • Understand how the following impact on brand and business reputation and how to apply then in own organisation:<br> - media and social media<br> - business ethics and corporate social responsibility<br> - political action such as sabotage or terrorism<br> - impact of business activities on people and the environment<br>• Know how to and the importance of reporting situations that threaten brand and business reputation in a timely manner to the appropriate person<br>• Know how to and the importance of following business policy/procedure if approached by the media<br>• Follow procedures to prevent the misuse of social media |
| Financial | • Uses own initiative to have impact on one or more of the following:<br>• Sales increase<br>• Waste reduction<br>• Quality of customer experience and retention<br>• Cost efficiently |
| Marketing | • Makes recommendation to improve marketing and promotion with examples given from continual assessment |
| Communication | • Demonstrates outstanding communication skills internally and externally<br>• Recognised by all (e.g. customers, team, management) as "great" with people |
| Product and service | • Accurately describe the features and benefits of relevant products to customers in a way which helps them identify the differences<br>• Has pride in the delivery of products and services<br>• Comprehensive range of product, knowledge and understanding can be demonstrated over and above what a customer can find for themselves.<br>• Can clearly and accurately summarise information to others in a way which is easily understood<br>• Genuine rapport with customer and going off script when engaging with them.<br>• Breadth of knowledge around benefits, insight into usefulness of product specs.<br>• Use of devices and relevant merits of each |

| Merchandising | • Understand how to maximise the creative use of space through the layout of the designated display area<br>• Understand how props and events are used in merchandising<br>• Understand how to plan and install window and store displays effectively and safely<br>• Understand the importance of and know how to prepare products for display |
|---|---|
| Team | • View difficult situations and issues from colleagues' perspective and provide support, where necessary, to move things forward<br>• Identify conflicts of interest and disagreements with colleagues and respond to them in ways that minimise impact on the work being carried out<br>• Provide feedback to colleagues on their performance and encourage them to feedback on own performance in order to identify areas for improvement<br>• Identify potential conflicts and take action to reduce or eliminate them<br>• Get involved in planning and leading sections of meetings |
| Stock | • Shows integrity, fairness and consistency in decision making |
| Performance | • Seeks opportunities for going beyond the basic requirements of the role<br>• Identifies and takes opportunities that will develop self.  These could be internal or external (such as the Duke of Edinburgh Award) but must clearly link to development in an increase in performance at work |

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