

End-point assessment plan for Assistant Buyer / Assistant Merchandiser apprenticeship standard

Apprenticeship standard reference number	Level of this end point assessment (EPA)	Integrated
ST0668	6	No

Contents

Introduction and overview.....	2
EPA summary table	3
Length of end-point assessment period:.....	4
Order of assessment methods.....	4
Gateway.....	5
Assessment methods	6
Weighting of assessment methods	14
Grading.....	16
Roles and responsibilities	17
Internal Quality Assurance (IQA)	18
Re-sits and re-takes	18
Affordability	19
Professional body recognition.....	19
Reasonable adjustments	19
Mapping of knowledge, skills and behaviours (KSBs)	20
Appendix A - Grading Criteria for the Work-Based project	27
Appendix B - Grading Criteria for the Professional Discussion	37

Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Assistant Buyer and Assistant Merchandiser apprenticeship standard. It is for end-point assessment organisations (EPAOs) who need to know how EPA for this Assistant Buyer and Assistant Merchandiser apprenticeship must operate. It will also be of interest to apprentices, their employers and training providers.

Full time apprentices will typically spend 24 months on-programme (before the gateway) working towards the occupational standard, with a minimum of 20% off-the-job training. All apprentices will spend a minimum of 12 months on-programme.

The EPA period should only start, and the EPA be arranged, once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, all of the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPAO.

All pre-requisites for EPA assessment methods must also be complete and available for the assessor as necessary.

For level 3 apprenticeships and above, apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA.

The EPA must be completed within an EPA period lasting a maximum of 6 month(s), beginning when the apprentice has passed the EPA gateway.

The EPA consists of 2 discrete assessment methods.

The individual assessment methods will have the following grades:

Assessment method 1: Work Based Project with a presentation and Q&As

- Fail
- Pass
- Distinction

Assessment method 2: Professional Discussion, underpinned by a portfolio of evidence

- Fail
- Pass
- Distinction

Performance in the EPA will determine the overall apprenticeship standard and grade of:

- Fail
- Pass
- Distinction

EPA summary table

On-programme (typically 18 months)	Training to develop the occupation standard's knowledge, skills and behaviours.
End-point Assessment Gateway	<ul style="list-style-type: none"> • <i>Employer is satisfied the apprentice is consistently working at, or above, the level of the occupational standard.</i> • Apprentices without level 2 English and maths will need to achieve this level prior to taking the End-Point Assessment. For those with an education, health and care plan or a legacy statement, the apprenticeship's English and maths minimum requirement is Entry Level 3. A British Sign Language (BSL) qualification is an alternative for those whose primary language is BSL. <p><i>Apprentices must complete:</i></p> <p><i>A portfolio of evidence, which should be submitted to the EPAO at the gateway</i></p>
End Point Assessment (which would typically take 6 months)	<p>Assessment Method 1: Work Based Project with a presentation and Q&As</p> <p>With the following grades:</p> <ul style="list-style-type: none"> · Fail · Pass · Distinction <p>Assessment Method 2: Professional Discussion, underpinned by a portfolio of evidence</p> <p>With the following grades:</p> <ul style="list-style-type: none"> · Fail · Pass · Distinction

Length of end-point assessment period:

The EPA must be completed within an EPA period lasting a maximum of 6 month(s), beginning when the apprentice has passed the EPA gateway.

If an EPA assessment method is failed, it should be resat or retaken within the EPA period and in-line with the requirements set out in this assessment plan.

Order of assessment methods

The assessment methods can be delivered in any order.

Gateway

The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say they have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer.

In addition to the employer's confirmation that the apprentice is working at or above the level in the occupational standard, the apprentice must have completed the following gateway requirements prior to beginning EPA:

English and mathematics at level 2.

For those with an education, health and care plan or a legacy statement the apprenticeships English and mathematics minimum requirement is Entry Level 3 and British Sign Language qualification are an alternative to English qualifications for whom this is their primary language.

For Work Based Project to include a presentation with Q&As:

- no specific requirements

For Professional Discussion, underpinned by a portfolio of evidence, the apprentice will be required to submit:

- A portfolio of evidence, which should be submitted to the EPAO at the gateway

Assessment methods

The apprenticeship is a core and options model. In addition to the core content, there are two options, one for the Assistant Buyer route, and one for the Assistant Merchandiser route.

Assessment Method 1: Work Based Project with a presentation and Q&A (This Method has 2 components.)

Method 1 Component 1: Work Based Project

Overview

The project is compiled after the apprentice has gone through the Gateway process.

The work-based project should be designed to ensure that the apprentice's work meets the needs of the business, is relevant to their role and allows the relevant KSBs to be demonstrated for the EPA. Therefore, the project's subject, title and scope will be agreed between the employer and the EPAO. The employer will ensure it has a real business application and the EPAO will ensure it meets the requirements of the EPA (including suitable coverage of the KSBs assignment to this assessment method). The EPAO must sign-off the project title to confirm its suitability prior to the project commencing. This will be completed during the first two weeks following the completed Gateway process.

The rationale for this assessment method is:

The work-based project is the most valid method as it allows a practical demonstration of professional competence. The project will contribute to the employer's business and be part of the apprentices every day work, ensuring that they can demonstrate KSBs in practice. Employers have stated that any project that delivers real margin benefit to the business will be wholeheartedly supported by businesses. This means it is also cost effective.

Delivery

Apprentices will conduct a project in the form of a work-based project, which must be agreed between the employer and the EPAO.

The project is compiled after the apprentice has gone through the Gateway process. The apprentice will conduct their project and submit it to the EPAO after a maximum of 3 months of the agreement of the project title. The independent assessor will have one month to review the project

The employer will ensure the apprentice has sufficient time and the necessary resources, within this period, to plan and undertake the project.

Whilst completing the project, the apprentice should be subject to the supervision arrangements outlined below:

Normal workplace supervision and support. The apprentice may work as part of a team, which could include internal or external support, however the report will be the apprentices own work and will be reflective of their own role and contribution.

The project should be in the form of paper based or electronic.

The project may be based on any of the following:

Crown copyright 2019 You may re-use this information (not including logos) free of charge in any format or medium, under the terms of the Open Government Licence. Visit www.nationalarchives.gov.uk/doc/open-government-licence

- Product lifecycle
- Supply chain strategy
- Supplier strategy
- Sustainability
- Waste reduction
- Improving sales / profitability

As a minimum all projects must include:

- An introduction
- The scope of the project (including, objectives, key performance indicators and anticipated benefits)
- A project plan
- How the outcomes were achieved
- Research and findings
- Project outcomes
- Recommendations and conclusions

The project will have a maximum of 7,000 words (+/- 10% at the discretion of the apprentice).

Appendices, references, diagrams are not included in the above word count.

The work-based project will be assessed for evidence that the knowledge, skills and behaviours required of an Assistant Buyer and Assistant Merchandiser are inherent in the apprentice's practice and the content of the project must enable the following to be demonstrated:

- The approach to planning and completion of the project, including what has to be delivered on completion of the project.
- The application of the knowledge and skills to meet the outcomes in the standard.
- The application of behaviours from the standard.
- Evidence of learning and of clear outcomes for the apprentice, their organisation and the customer.
- The work-based project should cover the project context, the apprentice's responsibilities, action taken by the apprentice (planning and execution) and results. The evidence provided must be attributable to the apprentice.

For those learners with a special learning need such as dyslexia the independent assessor will ensure that reasonable adjustments are in place where necessary.

The apprentice will be required to document their assumptions and to highlight the consequences of those assumptions, enabling them to demonstrate their understanding of commercial pressures, and the application of their thinking and problem-solving skills.

Input from the employer and EPAO will be limited to guidance in terms of project topic, scope, and recommended reading.

The project must map, in an appendix, how it evidences the relevant KSBs for this assessment method.

The project will be conducted as set out here:

Employers should ensure that the apprentice has the opportunity and time to complete their project during working hours.

The apprentice will need to consider the availability of company and external resources required to complete the project. They must also ensure they are fully aware of the KSBs the project is intended to assess as that is what the grading of the project will be based on.

It must be reviewed by the independent assessor before the presentation and Q&A. The presentation with Q&A should be scheduled to take place as soon as possible after the work-based project has been reviewed.

When the project is submitted, the employer and the apprentice should verify the submitted work is that of the apprentice.

Marking

The independent assessor will review and mark the project within one month, as determined by the EPAO, and without extending the EPA unnecessarily. Similarly, all quality control processes will also be conducted in a timely manner, as determined by the EPAO.

Required supporting material

EPAOs will produce the following material to support this assessment method:

- Outline of the assessment method's requirements
- Marking materials
- A guidance document for employers and apprentices on how the assessment will take place, including timescales.
- Feedback template to provide feedback to the apprentice.

Method 1 Component 2: Presentation of Work Based Project

Overview

Apprentices will prepare and deliver a presentation that appropriately covers the KSBs assigned to this method of assessment.

The presentation will be based on the work based project and will focus on skills in the following areas:

- A summary of the project and the apprentice's role and level of responsibility such as how they use data; how they work with partnerships, functions and departments etc
- The key issues or challenges on the project and how they were met such as how they undertake critical research; construct customer engagement plans etc
- The practical application of relevant knowledge, skills and behaviours
- The options considered, solutions identified and reasons why some options were not feasible
- What the apprentice achieved and how this was achieved

Apprentices must include in their presentation an evaluation of their project. This should include factors such as, what went well, lessons learned for future project activity, and any specific recommendations.

Crown copyright 2019 You may re-use this information (not including logos) free of charge in any format or medium, under the terms of the Open Government Licence. Visit www.nationalarchives.gov.uk/doc/open-government-licence

The presentation will be completed and submitted after the project has been completed and will be presented to an independent assessor, either face-to-face or via online video conferencing. If using an online platform, EPAOs must ensure appropriate measures are in place to prevent misrepresentation.

The apprentice will be able to prepare and complete the presentation at any point after completing the project, but should submit the presentation to the independent assessor at least 5 days before the presentation takes place.

The rationale for this assessment method is:

The presentation is part of the overall "Work-based Project and Presentation" assessment method. The rationale behind the use of the presentation element is that it replicates the sort of work undertaken by competent individuals in this profession. They are expected to be able to make presentations to individuals and groups. The presentation allows the project to be explored in more depth.

Delivery

The presentation and Q&A will last for a total of 70 minutes. The assessor has the discretion to increase the time of the presentation by up to 10% to allow the apprentice to complete their last point.

The independent assessor will ask a minimum of 10 questions at the end of the presentation. The questions asked by the independent assessor will be both drawn from a question bank supplied by the EPAO as well as specific questions that the assessor wishes to probe following the review of the project and presentation.

To deliver the presentation, the apprentice will have access to:

- PowerPoint
- flip chart
- work products
- videos
- interactive demonstrations
- notes
- computer
- story boards, mood boards, product examples

The presentation will be conducted as follows:

The 70 minutes should be split between the presentation and Q&A.

The presentation should last for 35 minutes, followed by 35 minutes of Q&A.

The EPAO must schedule the presentation and Q&A elements to take place within the 6 months of the apprentice successfully going through the gateway process and after the completion of the work-based project, giving an apprentice a minimum of 2 weeks' notice of the time, date and venue.

The presentation and Q&A elements must take place on a one-to-one basis between an independent assessor and an apprentice. The way in which the content of the presentation is made is not prescriptive.

The questioning should take place after the presentation.

Crown copyright 2019 You may re-use this information (not including logos) free of charge in any format or medium, under the terms of the Open Government Licence. Visit www.nationalarchives.gov.uk/doc/open-government-licence

Two weeks prior to the presentation and questioning, the independent assessor must have reviewed the apprentice's work based project (and prepared questions for the questioning element). However, the questions may be modified to take account of the presentation evidence.

The independent assessor can ask follow up questions for clarification that do not contribute to the 10 main questions.

The 10 main questions should be made up of 7 questions from the question bank and 3 questions that the independent assessor creates based on the review of the presentation.

Questions must seek to assess KSBs not evidenced through the presentation and work based project and/or depth of understanding to assess performance against the distinction criteria.

EPAOs must ensure any reasonable presentational requirements are in place e.g. power-point facilities.

Apprentices may refer to their work-based project, evidence contained within the work based project annex, presentation or presentation aides when answering the questions.

The independent assessor will make all grading decisions.

Venue

EPAOs must ensure that the presentation and questioning elements are conducted in a suitable controlled environment in any of the following:

- employer's premises
- other suitable venue selected by the EPAO (e.g. a training provider)

The venue should be a quiet room, free from distraction and external influence. The venue will also be a suitable space with the required equipment (a clock to ensure the apprentice can monitor time, Wi-Fi if any aspect of the presentation is interactive).

Support material

EPAOs will produce the following material to support this assessment method:

- Outline of the assessment method's requirements
- Marking materials
- practical question banks of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure they, and the specifications they contain, are fit for purpose.
- A feedback sheet for apprentices who fail the assessment method, this should be detailed enough to allow the employer and EPAO to decide if a new project needs to be undertaken, or if the presentation needs to be re-written and re-presented.
- It is recommended that EPAOs develop assessment tools in consultation with representative employers; where they do this, they must put measures in place to ensure question security.

Assessment Method 2: Professional Discussion, underpinned by a portfolio of evidence (This Method has 1 components.)

Method 2 Component 1: Professional Discussion, underpinned by a portfolio of evidence

Overview

This assessment will take the form of a professional discussion, which must be appropriately structured to draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method. It will involve the questions that will focus on coverage of prior learning or activity.

The Professional Discussion is underpinned by a Portfolio of Evidence

The content and structure of the portfolio of evidence needs to be agreed between the employer and the apprentice (e.g. hard copy or on-line), however the content must be sufficient to evidence that the apprentice can apply the knowledge, skills and behaviours required as mapped to assessment method 2 (AM2).

There must be at least one piece of evidence relating to each knowledge, skill and behaviour mapped to AM2. One piece of evidence can be referenced against more than one knowledge, skill or behavioural requirement. It is expected that there will be between 15 and 20 pieces of evidence.

The portfolio of evidence should contain a range of evidence that can be written, video or audio accounts (or other suitable business media) of activities that have been completed and referenced against the knowledge, skills and behaviours, supported by appropriate evidence. Reflective accounts and self-evaluation cannot be included as evidence. Examples would be:

- Video / audio comments / extracts / photographs
- Written statements
- Project plans
- Reports / Minutes / Action logs
- Observations
- Discussions from Networks / Working Groups
- Presentations
- Feedback (managers and Peers)
- Papers written by apprentice
- Performance Reviews
- SWOT analysis
- Spreadsheets
- Critical paths

The apprentice's Manager/Mentor will typically support the development of the portfolio in accordance with company policy and procedures. The employer must also confirm to the EPAO that the content of the portfolio is the apprentices own work.

The portfolio underpins the professional discussion and will not be assessed or graded during the end-point assessment.

The professional discussion can take place in any of the following:

- employer's premises
a suitable venue selected by the EPAO (e.g. a training provider's premises)
- Skype or equivalent on line resource. Video conferencing can be used to conduct the professional discussion, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in any way e.g. use of a 360 degree camera to allow the assessor to look around the room during the interview.

Additional, specific venue requirements include: If the portfolio of evidence is in a digital format, the apprentice and the independent assessor must have the equipment needed to access their copy.

The rationale for this assessment method is:

This method was judged to be the most appropriate for the KSBs being assessed. It allows a range of examples to be brought forward during the professional discussion and ensures that excellence can be evidenced and acknowledged.

Delivery

The independent assessors will conduct and assess the professional discussion.

The professional discussion must last for 90 minutes. The independent assessor has the discretion to increase the time of the professional discussion by up to 10% to allow the apprentice to complete their last answer. Further time may be granted for apprentices with appropriate needs, for example, where signing services are required.

During this method, the independent assessor must combine questions from the EPAO's question bank and those generated by themselves, as detailed below.

The professional discussion will be conducted as set out here:

This will be a 1:1 discussion. The apprentice and the independent assessor will have access to their own copies of the portfolio throughout the discussion and both can refer to it as needed.

The independent assessor will ask a minimum of 10 opening questions. They will lead the discussion, opening with a question from the EPAO bank of questions and then use additional questions throughout the discussion to allow the apprentice the best opportunity to evidence their competence. The independent assessor will use up to 6 follow up questions across the whole method for clarification as needed. These follow up questions will not contribute to the requirement for 10 opening questions.

The independent assessor will make notes of evidence / answers provided on the EPAO recording documentation.

The professional discussion should be recorded (audio only) for quality assurance and moderation purposes.

The recordings will be kept safe and stored by the EPAO in line with data protection legislation and destroyed after a maximum of 1 month after the period for the appeals process has passed.

Crown copyright 2019 You may re-use this information (not including logos) free of charge in any format or medium, under the terms of the Open Government Licence. Visit www.nationalarchives.gov.uk/doc/open-government-licence

The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the professional discussion.

The independent assessor and EPAO will make all grading decisions.

Venue

The professional discussion should take place in a quiet room, free from distractions and influence.

Other relevant information

A structured specification and question bank must be developed by EPAOs. The 'question bank' must be of sufficient size to prevent predictability and review it regularly (and at least once a year) to ensure that it, and its content, are fit for purpose. The specifications, including questions relating to the underpinning knowledge, skills and behaviours, must be varied yet allow assessment of the relevant KSBs.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

Independent assessors must be developed and trained by the EPAO in the conduct of professional discussion and reaching consistent judgement.

EPAOs will produce the following material to support this assessment method:

- Outline of the assessment method's requirements
- Marking materials
- Data capture form for evidence and gaps
- Question banks of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure they, and the specifications they contain, are fit for purpose.'
- Guidance document for employers and apprentices on the process / timescales for the discussion as well as a description of the purpose of the professional discussion
- Guidance document for independent assessors on how to carry out the professional discussion.

Weighting of assessment methods

All assessment methods are weighted equally in their contribution to the overall EPA grade.

Grading

Assessment method 1: Work Based Project with a presentation and Q&A

See Appendix A for full grading descriptors

See Mapping section for the mapping of Option pathways to this method.

KSBs	Fail	Pass	Distinction
CORE: K6 K9 K10 K11 K12 K13 K14 K15 K17 K22 K23 S1 S5 S7 S9 S10 S19 S20 B2 B5 Option 1 Assistant Buyer K25 K27 K28 K29 K30 S21 S22 S24 S25 S26 S27 S31 Option 2 Assistant Merchandiser K34 K35 K38 K39 K45 S35 S37 S45 S49	<p>The apprentice will be deemed to have failed the assessment method if they do not meet the criteria outlined in the pass descriptor.</p>	<p>In order to achieve a "pass" all of the pass descriptors mapped to this assessment method must be met.</p>	<p>In order to achieve a distinction, all of the pass criteria, 5 of the core distinction criteria and all distinction criteria for the chosen option mapped against this assessment method must be met.</p>

Assessment method 2: Professional Discussion, underpinned by a portfolio of evidence

See Appendix B for full grading descriptors

See Mapping section for the mapping of Option pathways to this method.

KSBs	Fail	Pass	Distinction
<p>CORE: K1 K2 K3 K4 K5 K7 K8 K16 K18 K19 K20 K21 K46 K47</p> <p>S2 S3 S4 S6 S8 S11 S12 S13 S14 S15 S16 S17 S18 S50</p> <p>B1 B3 B4</p> <p>Option 1 Assistant Buyer</p> <p>K24 K26 K31 K32 K33</p> <p>S23 S28 S29 S30 S32</p> <p>Option 2 Assistant Merchandiser</p> <p>K36 K37 K40 K41 K42 K43 K44</p> <p>S33 S34 S36 S38 S39 S40 S41 S42 S43 S44 S46 S47 S48</p>	<p>The apprentice will be deemed to have failed the assessment method if they do not meet the criteria outlined in the pass descriptor.</p>	<p>In order to achieve a "pass" all of the pass descriptors mapped to this assessment method must be met.</p>	<p>In order to achieve a distinction, all of the pass criteria, 9 of the core distinction criteria and all distinction criteria for the chosen option mapped against this assessment method must be met.</p>

Overall EPA grading

All EPA methods must be passed for the EPA to be passed overall.

To achieve a pass, the apprentice must achieve a pass in both assessment methods.

To achieve a pass in an assessment method, the apprentice must achieve a pass in every pass criteria.

To achieve a distinction, the apprentice must achieve a distinction in both assessment methods.

To achieve a distinction in an assessment method, the apprentice must achieve:-

- Assessment Method 1 – apprentice must achieve at least 5 of the 7 core distinction criteria and all criteria for the chosen option.
- Assessment Method 2 – apprentice must achieve at least 9 of the 12 core distinction criteria and all criteria for the chosen option.

Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole:

Assessment method 1	Assessment method 2	Overall grading
Fail	Fail	Fail
Fail	Pass	Fail
Pass	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Pass
Distinction	Distinction	Distinction

Roles and responsibilities

Role	Responsibility
Apprentice	<ul style="list-style-type: none"> • complete the on-programme element of the apprenticeship • prepare for and complete the EPA
Employer	<ul style="list-style-type: none"> • identify when the apprentice is ready to pass the gateway and undertake their EPA • notify the EPAO that the apprentice has passed the gateway
EPAO	<p>As a minimum EPAOs should:</p> <ul style="list-style-type: none"> • appoint administrators/assessors and markers to administer/assess and mark the EPA • provide training and CPD to the independent assessors they employ to undertake the EPA • have no direct connection with the apprentice, their employer or training provider i.e. there must be no conflict of interest • have processes in place to conduct internal quality assurance and do this on a regular basis • organise standardisation events and activities in accordance with this plan's IQA section • organise and conduct moderation of independent assessors' marking in accordance with this plan • have, and operate, an appeals process
Independent assessor	<p>As a minimum an Independent assessor should:</p> <ul style="list-style-type: none"> • be independent of the apprentice, their employer and training provider(s) i.e. there must be no conflict of interest • hold or be working towards an independent assessor qualification e.g. A1 and have had training from their EPAO in terms of good assessment practice, operating the assessment tools and grading • have the capability to assess the apprentice at this level • attend the required number of EPAOs standardisation and training events per year (as defined in the IQA section)
Training provider	<p>As a minimum the training provider should:</p> <ul style="list-style-type: none"> • work with the employer to ensure that the apprentice is given the opportunities to develop the KSBs outlined in the standard and monitor their progress during the on-programme period • advise the employer, upon request, on the apprentice's readiness for EPA prior to the gateway • Plays no part in the EPA itself

Internal Quality Assurance (IQA)

Internal quality assurance refers to the requirements that EPA organisations must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. EPA organisations for this EPA must:

- appoint independent assessors who have knowledge of the following occupational areas: Experience as a buyer or merchandiser, with at least 3 years' experience in the role (acknowledging that different employers have different job titles).
- appoint independent assessors who have recent relevant experience of the occupation/sector at least one level above the apprentice gained in the last two years or significant experience of the occupation/sector.
- appoint independent assessors who are competent to deliver the end-point assessment
- provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- have robust quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time.
- operate induction training and standardisation events for independent assessors when they begin working for the EPAO on this standard and before they deliver an updated assessment method for the first time
- ensure that independent assessors attend standardisation sessions on a regular basis and at least once a year.

Re-sits and re-takes

Apprentices who fail one or more assessment method will be offered the opportunity to take a re-sit or a re-take. A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for the re-sit or a re-take. The apprentice's employer will need to agree that either a re-sit or re-take is an appropriate course of action.

An apprentice who fails an assessment method, and therefore the EPA in the first instance, will be required to re-sit or re-take any failed assessment methods only. If an apprentice fails the project element of the end-point assessment they will be asked to rework the work based project taking into account the feedback from the independent assessor. They will not be asked to complete a new work based project. They will also be asked to undertake a further presentation. The work based project / presentation will only be awarded a pass if the apprentice has to resit/retake it.

The timescales for a resit/retake is agreed between the employer and EPAO. A resit is typically taken within 7 months of the EPA outcome notification. The timescale for a retake is dependent on how much re-training is required and is typically taken within 10 months of the EPA outcome notification.

Re-sits and re-takes are not offered to apprentices wishing to move from pass to distinction.

Where any assessment method has to be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of pass, unless the EPAO determines there are exceptional circumstances requiring a re-sit or re-take.

Affordability

Affordability of the EPA will be aided by using at least some of the following practice:

- using an employer's premises
- use of teleconferencing
- implementing a project with real business benefits

Professional body recognition

Professional body recognition is not relevant to this occupational apprenticeship.

Reasonable adjustments

The EPAO must have in place clear and fair arrangements for making reasonable adjustments for this apprenticeship standard. This should include how an apprentice qualifies for Reasonable Adjustment and what Reasonable Adjustments will be made. The adjustments must maintain the validity, reliability and integrity of the assessment methods outlined in this assessment plan.

Mapping of knowledge, skills and behaviours (KSBs)

Assessment method 1: Work Based Project to include a presentation

Core Knowledge, Skills and Behaviours

	Knowledge
K6	Understands how different business models, buying cycles, trading models and customer groups can affect the buying and merchandising process.
K9	Understands the key factors that influence the quality of a product and tolerance levels.
K10	Understands the strategic implications for product range development, and the appropriate courses of action available.
K11	Understands the importance of ensuring that at all stages of the buying and merchandising process, the product is fit for purpose and meets company standards
K12	Understands impact of new and evolving purchasing options across different fulfilment channels.
K13	Understands the main influencers on sales and profit growth, and can lead the team to achieve them.
K14	Understands the key financial levers and ratios that affect profitability, and can manage the team to ensure that profit is maximized.
K15	Understands the key deliverables associated with the buying and merchandising function, such as cost return rates, re-buys, cancellations, debit agreements, delivery dates, lead times etc.
K17	Understands the importance of effective partnerships with other functions and departments, such as Merchandising, Sales and Finance, and leads the team to ensure that the outcomes from the relationships are maximized.
K22	Knows how to identify the customer's current and future needs and purchasing trends, including ethical and sustainable retailing
K23	Understands how different channels of delivery, buying cycles, trading models and customer groups can affect the buying and merchandising processes
	Skills
S1	Apply understanding of customer and business operations to inform decisions on product / service portfolio management.

S5	Analyse and react to main influences on Buying and Merchandising plans, taking appropriate actions as a result.
S7	Makes appropriate managerial decisions to ensure the departmental approach to selecting products / services balances quality and commerciality
S9	Critically evaluate and advocate opportunities presented by new technologies taking account of how they will impact on the product range, fulfilment and consumer behaviour.
S10	Analyses appropriate cost / income influences on buying and merchandising plans to make informed decisions
S19	By using data, analyse and predict the customer's current and future needs and purchasing trends, including how the customer journey is impacted
S20	Using critical research, construct a customer engagement plan identifying the effective and profitable channels to market
Behaviours	
B2	As a leader, is resilient, responsible, commercially aware and takes the initiative
B5	Is creative in their approach to the role

Option 1 Assistant Buyer – Knowledge and Skills

Knowledge	
K25	Understands key Buying analysis criteria such as, competitor benchmarking, price comparison, and competitor analysis.
K27	Understands the need to develop and implement innovative and responsive processes and systems to customer's digital demands.
K28	Understands the requirements of delivering to the most appropriate route to market.
K29	Understands the potential problems that can arise from non-legal and ethical compliance and options for mitigation.
K30	Understands the concept and impact of new product development.
Skills	
S21	Assesses and implements the relevant approach required from a buying and merchandising strategy, to take account of differing types of delivery channel, product and customer.
S22	Using critical research, construct a customer engagement plan identifying the effective channels to market.
S24	Analyses the key buying criteria to help shape the planned product range

S25	Critically evaluates the current and future methods of digital delivery, and anticipates customer changes in respect of the use of digital and Artificial Intelligence
S26	Being able to implement techniques such as business planning, pricing strategies, product design and product manufacturing to maximise sales and profitably
S27	Ensures that the organisation's ethical and legal policies and procedures are monitored and adhered to by the team and suppliers.
S31	Can identify when problems are likely to occur, and manage action required to resolve them.

Option 2 Assistant Merchandiser – Knowledge and Skills

Knowledge	
K34	Understands how to effectively utilise data in order to identify commercial opportunities for their organization
K35	Understands the importance of working together with other teams (especially buying)
K38	Understands allocation strategies and ensure effective data inputting
K39	Understands how to interrogate data in order to make effective trading decisions
K45	Understands the principles of having the right stock in the right place at the right time, in order to satisfy customer demand.
Skills	
S35	Demonstrates customer insight in preparing forecasts
S37	Ensures that the organisation's ethical and legal policies and procedures are adhered to.
S45	Effectively liaises with other key stakeholders to ensure a joined-up approach across the business.
S49	Demonstrate effective problem solving and time management skills, and an expert written and verbal communication style

Assessment method 2: Professional Discussion, underpinned by a portfolio

Core Knowledge, Skills and Behaviours

	Knowledge
K1	Understands the overall product portfolio and brand image that the company is promoting to the customer, and can purchase / merchandise the products accordingly.
K2	Understands how to identify current and future buying and loyalty behaviours of existing and potential customer groups, for core and third party products
K3	Understands the impact of the buying critical path on the effective operation of the buying function. Understands the concept and impact of new product development.
K4	Understands when a product / product range has reached the end of its lifecycle, and acts appropriately to ensure its removal from the product range.
K5	Understands the key factors that influence UK and global markets, including economic and political activity
K7	Understands the impact of emerging technological changes, for example AI, in terms of how product is sourced, how buying and merchandising processes might be improved, and how they might impact on customers,
K8	Understands what factors contribute to the strategic development of the buying and merchandising function, and how through their leadership, they can influence the development of the strategy
K16	Understands the importance of effective negotiation and managing an ongoing relationship, including with designers, manufacturers and suppliers.
K18	Knows when to make appropriate refer decisions to senior executives in order to obtain the correct level of authorisation.
K19	Understands why effective planning and forecasting are vital to delivering a robust range plan, such as aspects of customer demand and changes in buying patterns.
K20	Understands the importance of, and strategies to, lead, coach, motivate and develop members of the team
K21	Understands the importance of leadership style and self - development, on the success of the business
K46	Understands the impact that they have as a leader on the business,.
K47	Knows how to effectively build relationships with key external stakeholders

Skills	
S2	Selects and merchandises products that enhance the company brand image and product portfolio
S3	Anticipates the need for products and ensures that the buying process enables their effective delivery to the customer
S4	Delivers and articulates supported recommendations regarding the introduction or withdrawal of a product / product range.
S6	Leads the team to construct the key buying and merchandising objectives and plans for the specific product range to reach or exceed sales at forecasted levels.
S8	Uses management-based monitoring procedures throughout the buying / merchandising process, taking account of legal and other requirements to ensuring product compliance is maintained.
S11	Through their influence as a leader, looks to use digital opportunities to drive sales and profitability across all channels where appropriate
S12	Demonstrates how to negotiate in a manner that obtains the optimum outcome for the business
S13	Through their leadership and management of the team, demonstrates a strategic approach to the relationship with other departments.
S14	Anticipates potential problems and opportunities through the effective liaison at the appropriate level with other teams / functions.
S15	Critically reviews and revises plans and forecasts for the function, taking into account the latest trend analyses, to produce the range.
S16	Develops and implements a 'People Plan', that is effective in ensuring sufficient team capacity and capabilities to deliver on business objectives
S17	Demonstrates an effective leadership style in achieving the key business objectives.
S18	Ensure continuous personal and team development to enhance delivery
S45	Effectively liaises with other key stakeholders to ensure a joined-up approach across the business.
S50	Assess the impact that they have on key external relationships, and adjusts their style to ensure that they achieve maximum benefit for the business
Behaviours	
B1	Acts as an ambassador for the buying and merchandising function and the business
B3	Seeks opportunities to develop themselves and the team

B4	Builds relationships across the whole function and beyond.
-----------	--

Option 1 Assistant Buyer – Knowledge and Skills

Knowledge	
K24	Understands how to identify current and future buying and loyalty behaviours of existing and potential customer groups.
K26	Understands the roles that techniques such as business planning, pricing strategies, product design and product manufacture, often in a global context, have on the overall success of the business
K31	Understands the importance of onboarding new suppliers to ensure full compliance with internal and external standards
K32	Understand where additional corporate requirements are needed to enhance compliance practice
K33	Understands the process that is required to ensure the rectification of any failures
Skills	
S23	Work in partnership with the customer engagement team to achieve better outcomes for both existing and new customer groups
S28	Anticipates the need for products and to ensure that the buying process enables their effective delivery to the customer
S29	Can articulate a supported recommendation regarding the introduction or withdrawal of a product / product range
S30	Ensures compliance with company operating standards in the sourcing of range.
S32	Effectively analyses the key buying criteria to help shape the planned product range for 3rd party products

Option 2 Assistant Merchandiser – Knowledge and Skills

Knowledge	
K36	Understands the potential problems that can arise in merchandising and how they can be mitigated.
K37	Understands concepts such as 'Modern Slavery' and how they might impact on the business
K40	Understand merchandising concepts such as 'fixturation', and the effective use of space

K41	Understands the impact of effective forecasting on the operation of the merchandising function
K42	Understands in depth, the purpose of the critical path
K43	Understands supplier data, such as delivery intakes , packaging requirements etc
K44	Understand differing requirements across all methods of delivery (eg instore and on line)
	Skills
S33	Has the ability to ensure that the right product is available at the right time, in the right place.
S34	Produces and delivers accurate forecasts which demonstrate creative and ambitious suggestions for future strategy
S36	Demonstrates the activities needed to ensure that the forecast is underpinned by financial considerations and business strategy
S38	Ensures that all team members operate within current legal guidance.
S39	Operates to, and ensures relevance of company operating standards
S40	Makes commercial decisions based on product, category and departmental performance
S41	Maximises every trading opportunity in order to deliver sound commercial outcomes for the organisation
S42	Using IT skills, develop strong spreadsheet / pivot table creation knowledge to enhance and optimize reporting and analysis data, so as to improve sales and profitability.
S43	Anticipates the need for products and ensures that the buying process enables their effective delivery to the customer
S44	Prepare executive level reports on current and forecasted performance, and using advanced presentation skills, ensure the communication of the outcomes is delivered in the most effective and profitable way.
S46	Delivers to the critical path plan in order to ensure that delivery deadlines are met, and that intakes meet stock levels
S47	Delivers timely and accurate forecasts to ensure that customer needs are met.
S48	Communicates directly with suppliers to ensure receipt of stock

Appendix A – Grading Criteria for the Work-Based Project

Apprentices will only be assessed on KSBs mapped to the core and the ones mapped to their specialist option – see apprenticeship occupational standard for details.

Fail- The apprentice will be deemed to have failed if they do not meet the criteria outlined in the pass descriptor.

Core grading descriptors

Area of Assessment	Knowledge, Skills Behaviours	Pass Criteria – The apprentice’s project must demonstrate that they:	A successful contribution at distinction will meet all the pass criteria, 5 of the core distinction criteria and all distinction criteria for the chosen option.
Creatively manage a portfolio of products / services to ensure that the critical path(s) for the assortment is (are) followed, taking appropriate corrective actions to resolve issues as needed.	<p>S1. Apply understanding of customer and business operations to inform decisions on product / service portfolio management.</p> <p>B5. Is creative in their approach to the role</p>	Demonstrates their understanding of customer and business operations to be able to provide creative solutions to resolving issues that they have identified with their critical path assortment.	Appraises solution and explains the risks and implications of the process, alternative approaches and ways to address them.
Apply detailed knowledge of UK and / or global markets to select and develop an appropriate product / service range.	<p>K6. Understands how different business models, buying cycles, trading models and customer groups can affect the buying and merchandising process.</p> <p>S5. Analyse and react to main influences on Buying</p>	Analyses buying and merchandising plans to determine what affects the different models and customer groups have on them and what actions they need to take to reduce the impact of these.	Demonstrates an understanding of the risks and implications to the business of the application of new trading models and how these methods are selected, and unintended consequences to the business when they are applied (i.e they understand that solving problem A, can cause problem B and can weigh up the benefits).

	and Merchandising plans, taking appropriate actions as a result.		
Through effective leadership, develop and contribute to departmental buying / merchandising strategy to ensure overarching organisation objectives are met and that products / services meet the needs of the customer.	<p>K9. Understands the key factors that influence the quality of a product and tolerance levels.</p> <p>K10. Understands the strategic implications for product range development, and the appropriate courses of action available.</p> <p>K11. Understands the importance of ensuring that at all stages of the buying and merchandising process, the product is fit for purpose and meets company standards</p> <p>S7. Makes appropriate managerial decisions to ensure the departmental approach to selecting products / services balances quality and commerciality</p> <p>B2. As a leader, is resilient, responsible, commercially aware and takes the initiative</p>	<p>Uses an example to explain the strategic implications for the development of a product range and the key factors that influence its quality and tolerance levels.</p> <p>Demonstrates their commercial awareness and how as a manager that they take the initiative on making managerial decisions on selecting products and monitoring the complete buying and merchandising process for the product.</p>	Interprets, critically evaluates and recommends actions to mitigate problems which have the potential to impact business performance for example, impact on product quality, cost and delivery, when the buying and merchandising process has not been followed.
Take account of emerging	K12. Understands impact of new and evolving	Evaluates the impact of new evolving purchasing options and	Uses emerging technology to outline creative solutions to reduce a

<p>technological changes in design and delivery as well as new markets to maximise market share and profitability.</p>	<p>purchasing options across different fulfilment channels.</p> <p>S9. Critically evaluate and advocate opportunities presented by new technologies taking account of how they will impact on the product range, fulfilment and consumer behaviour.</p> <p>B5. Is creative in their approach to the role</p>	<p>the opportunities presented by new technologies, identifying their impact on the product and consumer behavior.</p>	<p>negative impact on product range and fulfilment, and identify where customer behavior will need to adapt to these changes.</p>
<p>Make informed managerial decisions that mitigate risk, drive sales and profitability, taking into account the requirements of different customer delivery channels.</p>	<p>K13. Understands the main influencers on sales and profit growth, and can lead the team to achieve them.</p> <p>K14. Understands the key financial levers and ratios that affect profitability, and can manage the team to ensure that profit is maximized.</p> <p>S10. Analyses appropriate cost / income influences on buying and merchandising plans to make informed decisions.</p> <p>B2. As a leader, is resilient, responsible, commercially</p>	<p>Demonstrates an understanding of what the main influencers are on sales and profit growth and how they take the initiative and responsibility for leading their team to achieve them.</p> <p>Outlines the key financial levers that affect profitability, and analyses the cost/income influencers to make decisions on plans and manages the team to ensure that the work they do maximizes profit.</p>	<p>Applies theory with insight and awareness of risks and rewards, describing how theory was applied with clear analysis of the impact and risks.</p>

	aware and takes the initiative		
Drive sales and profitability through effective negotiations with suppliers on key deliverables such as: capacity, cost price and flexibility, re-buys, cancellations, delivery dates, lead times, promotion support etc.	K15. Understands the key deliverables associated with the buying and merchandising function, such as cost return rates, re-buys, cancellations, debit agreements, delivery dates, lead times etc.	Manages sales and profitability with appropriate levels of planning, negotiation with suppliers and key deliverables and how these are used within their function.	Investigates innovative improvement methods and techniques to drive sales and profit, and evaluates their suitability for use within the context of their discipline.
Manage and collaborate with key internal stakeholder functions to agree appropriate promotional strategies and other activities to maximise the success / profitability of the allocated assortment.	K17. Understands the importance of effective partnerships with other functions and departments, such as Merchandising, Sales and Finance, and leads the team to ensure that the outcomes from the relationships are maximized.	Outlines the importance of maintaining close partnerships with other functions and motivates and mentors their team to do this to ensure that strong relationships are maintained.	
Ensure all channels to market are considered and the most appropriate channel(s) is/are selected to maximise	K22. Knows how to identify the customer's current and future needs and purchasing trends, including ethical and sustainable retailing	Demonstrates where they identify and analyse data to predict current and future needs of the customer and their buying trends, and how the different channels of buying cycles, customer trends etc can	Defends the decisions they have made on their customer engagement plan linking it to sustainable and ethical retailing as well as meeting future customer trends and increasing organisational profit.

<p>the sales and profit potential.</p>	<p>K23. Understands how different channels of delivery, buying cycles, trading models and customer groups can affect the buying and merchandising process.</p> <p>S19. By using data, analyses and predict the customer's current and future needs and purchasing trends, including how the customer journey is impacted</p> <p>S20. Using critical research, construct a customer engagement plan identifying the effective and profitable channels to market.</p> <p>B2. As a leader, is resilient, responsible, commercially aware and takes the initiative</p>	<p>affect the buying and merchandising process.</p> <p>Demonstrates their commercial awareness by using critical research to develop and deliver a customer engagement plan which links it to the profitable channels to market.</p>	
--	--	--	--

Option 1 Assistant Buyer – grading descriptors

Area of Assessment	Knowledge, Skills Behaviours	Pass Criteria – The apprentice’s project must demonstrate that they:	A successful contribution at distinction will meet all the pass criteria, 5 of the core distinction criteria and the 2 distinction criteria for the chosen option.
Developing own brand products to meet current trends / customer requirements, linked to strategy and financial targets.	<p>S21. Assesses and implements the relevant approach required from a buying and merchandising strategy, to take account of differing types of delivery channel, product and customer.</p> <p>S22. Using critical research, construct a customer engagement plan identifying the effective channels to market.</p> <p>S24. Analyses the key buying criteria to help shape the planned product range</p>	<p>Describes how different delivery channels and models affect the buying and merchandising process and how this combines with key buying analysis criteria in order to implement organisation approach to buying.</p> <p>Uses an example to explain how they undertake price comparison and competitor analysis to construct customer engagement plans.</p>	Interprets key customer data and breaks down the analysed strategy in order to defend why product ranges have been selected and how they have used customer groups to support their results.
Ensure department is set up to maximise sales / profitability by using techniques such as pricing strategies, product	K27. Understands the need to develop and implement innovative and responsive processes and systems to	Outlines the techniques and strategies that they use to determine appropriate routes to market for the product range, including a system they have implemented to meet customer’s	

<p>trends, product design and appropriate routes to market.</p>	<p>customer's digital demands.</p> <p>K28. Understands the requirements of delivering to the most appropriate route to market.</p> <p>S25. Critically evaluates the current and future methods of digital delivery, and anticipates customer changes in respect of the use of digital and Artificial Intelligence</p> <p>S26. Being able to implement techniques such as business planning, pricing strategies, product design and product manufacturing to maximise sales and profitably</p>	<p>digital demands and why this is the most appropriate route.</p> <p>Demonstrates where they have evaluated current and future methods of digital delivery and why it is important to anticipate customer changes and where they will link to organisation strategies and product design to maximize sales and profitably.</p>	
<p>Ensure they and their team deliver in an ethical, sustainable and legal way in the sourcing of product ranges, aligned to the overall strategy of the business.</p>	<p>K29. Understands the potential problems that can arise from non-legal and ethical compliance and options for mitigation.</p> <p>S27. Ensures that the organisation's ethical and legal policies and procedures are monitored and adhered to by the team and suppliers.</p>	<p>Outlines problems that can occur if an organisation does not follow ethical compliance when sourcing product ranges, including what non-legal compliance means and how this affects an organisation.</p>	<p>Uses an example to show how they ensure both their team and suppliers adhere to legal policies.</p>

Analyse and evaluate overall performance of the Buying function, against the original strategy and business plan, identifying lessons to learn for future business cycles.	K30. Understands the concept and impact of new product development.	Details how they lead the development of a new product, what commercial knowledge they had to apply and what was the impact of this on the organisation.	
Ensure ranges are sourced to comply with relevant safety and quality standards. Oversee the process to identify and rectify any failures in safety and / or quality.	S31. Can identify when problems are likely to occur, and manage action required to resolve them.	Explains how they took the initiative to identify problems and what actions they took to resolve them.	
Source and select 3rd party products to meet current trends / customer requirements, linked to strategy and financial targets.	K25. Understands key Buying analysis criteria such as, competitor benchmarking, price comparison, and competitor analysis.	Describes what analysis criteria they use to meet customer trends and requirements and how they are responsible for linking them to both strategy and financial targets.	

Option 2 Assistant Merchandiser – grading descriptors

Area of Assessment	Knowledge, Skills Behaviours	Pass Criteria – The apprentice’s project must demonstrate that they:	A successful contribution at distinction will meet all the pass criteria, 5 of the core distinction criteria and all 3 distinction criteria for the chosen option.
<p>Uses analysis to develop range framework identifying commercial opportunities. Collaborate with the buying team to input into or create a plan to deliver a commercial assortment that maximises sales and margin</p>	<p>K34. Understands how to effectively utilise data in order to identify commercial opportunities for their organisation K35. Understands the importance of working together with other teams (especially buying) S35. Demonstrates customer insight in preparing forecasts</p>	<p>Outlines how they use data to deliver customer insight when preparing forecasts and future opportunities for their organisation. Uses an example to show why they work with other teams to ensure that all activities used for forecasting are underpinned by both the financial considerations and business strategy for the future.</p>	<p>Uses an example to show where forecasts were not clear due to teams not working together and the impact this has on the product and organisation’s financial targets.</p>
<p>Ensure they and their team work in an ethical and legal way in the supply of product ranges, aligned to the overall strategy of the business.</p>	<p>S37. Ensures that the organisation’s ethical and legal policies and procedures are adhered to.</p>	<p>Describes what actions they take in their role to ensure that ethical and legal policies are adhered to, and what additional requirements have been put in place to enhance this practice.</p>	
<p>Trades effectively delivering to sales</p>	<p>K38. Understands allocation strategies and</p>	<p>Describes their responsibility as a leader when interrogating data to</p>	

and profit targets whilst identifying and taking relevant actions, to account for market and performance factors.	ensure effective data inputting K39. Understands how to interrogate data in order to make effective trading decisions	support decisions they need to make on trading, and what the results would be if data had not been correctly input.	
Analyse and evaluate overall performance of the merchandising function, against the original strategy and business plan, identifying lessons to learn for future business cycles in order to maximise sales	S45. Effectively liaises with other key stakeholders to ensure a joined-up approach across the business. S49. Demonstrate effective problem solving and time management skills, and an expert written and verbal communication style	Describes the concept of new product development and what the impact would be if they failed, as a leader, to deliver effective forecasting on sales. Demonstrates where they have resolved a problem within their function and what lessons were learnt to ensure that it didn't affect sales.	Develops strategic reports to detail current and forecasted performance, presenting these clearly in order to highlight the most printable way to maximize sales.
Ensure the availability of appropriate product range to meet customer demand and expectations across all delivery channels. This to be achieved, through detailed forecasting, and management of the WSSI, supplier interaction and critical path management	K45. Understands the principles of having the right stock in the right place at the right time, in order to satisfy customer demand.	Demonstrates where they have taken the lead in ensuring that stock is available and in the right place to meet customer demand.	Predicts when stock should be delivered by using timely and accurate forecasts meeting both the commercial demands of the business and the buying trends of the customer.

Appendix B – Grading Criteria for the Professional Discussion

Apprentices will only be assessed on KSBs mapped to the core and the ones mapped to their specialist option – see apprenticeship occupational standard for details.

Fail- The apprentice will be deemed to have failed if they do not meet the criteria outlined in the pass descriptor.

Core grading descriptors

Area of Assessment	Knowledge, Skills, Behaviours	Pass Criteria – The apprentice’s project must demonstrate that they:	In order to achieve a distinction, all of the pass criteria, 9 of the core distinction criteria and all 3 distinction criteria for the chosen option mapped against this assessment method must be met.
Creatively manage a portfolio of products / services to ensure that the critical path(s) for the assortment is (are) followed, taking appropriate corrective actions to resolve issues as needed.	<p>K1. Understands the overall product portfolio and brand image that the company is promoting to the customer, and can purchase / merchandise the products accordingly.</p> <p>K2. Understands how to identify current and future buying and loyalty behaviours of existing and potential customer groups, for core and third party products</p> <p>K3. Understands the impact of the buying critical path on the effective operation of the buying function. Understands the concept and impact of new product development.</p>	<p>Summarises the product portfolio and brand image that the company promotes in order to explain why they purchase and merchandise products to meet the needs of both current and future customers.</p> <p>Acting as an ambassador for their business, demonstrates how they identify and use customer buying and loyalty behaviours when purchasing and merchandising core products and those from third parties,</p> <p>Uses an example to show how they use the impact of the buying critical path on their function and new product development including when a product has reached the end of its lifecycle and when it should be removed from the range.</p>	<p>Justifies why a product range is selected and can predict future customer needs for it.</p> <p>Demonstrates where they have judged it appropriate to remove a product before it reaches the end of its lifecycle and what the impact of this was on the organisation and the customer.</p>

	<p>K4. Understands when a product / product range has reached the end of its lifecycle, and acts appropriately to ensure its removal from the product range.</p> <p>S2. Selects and merchandises products that enhance the company brand image and product portfolio.</p> <p>S3. Anticipates the need for products and ensures that the buying process enables their effective delivery to the customer</p> <p>S4. Delivers and articulates supported recommendations regarding the introduction or withdrawal of a product / product range.</p> <p>B1. Acts as an ambassador for the buying and merchandising function and the business</p>	<p>Describes how they select products that will enhance their brand image anticipating their need and ensuring that they are delivered to the customer effectively within agreed timescales.</p> <p>Formulates recommendations on why a product range should be introduced or when it has reached the end of its lifecycle and should be withdrawn.</p>	
<p>Apply detailed knowledge of UK and / or global markets to select and develop an</p>	<p>K5. Understands the key factors that influence UK and global markets,</p>	<p>Uses an example to demonstrate the key factors of that influence UK and global markets within their buying and merchandising function, and how they use intelligence to</p>	<p>Challenges sales targets and uses customer data to forecast where levels can be exceeded.</p>

<p>appropriate product / service range.</p>	<p>including economic and political activity</p> <p>S6. Leads the team to construct the key buying and merchandising objectives and plans for the specific product range to reach or exceed sales at forecasted levels.</p> <p>B1. Acts as an ambassador for the buying and merchandising function and the business</p>	<p>identify how they may improve their processes and what impact they will have on their customers.</p> <p>Demonstrates how they lead their team to agree objectives and devise product range plans which lead to increased sales above forecasted levels.</p>	<p>Uses their role as an ambassador to develop relationships with customers in order to identify how their processes impact on them and outline improvements that they have made.</p>
<p>Through effective leadership, develop and contribute to departmental buying / merchandising strategy to ensure overarching organisation objectives are met and that products / services meet the needs of the customer.</p>	<p>K8. Understands what factors contribute to the strategic development of the buying and merchandising function, and how through their leadership, they can influence the development of the strategy</p> <p>K18. Knows when to make appropriate refer decisions to senior executives in order to obtain the correct level of authorisation.</p> <p>S8. Uses management-based monitoring procedures throughout the buying / merchandising process, taking account of</p>	<p>Explains the factors contributing to the strategic development of the buying and merchandising function.</p> <p>Explains the systems and processes that would be used to ensure the strategic development of their function specifically focusing on ensuring that all products are legally compliant,</p> <p>Uses an example to demonstrate when they have had to refer a decision in order to obtain the correct level of authorization and why this was done</p>	<p>Interprets, critically evaluates and recommends actions to mitigate problems to ensure that a product meets legal requirements.</p>

	legal and other requirements to ensuring product compliance is maintained.		
Take account of emerging technological changes in design and delivery as well as new markets to maximise market share and profitability.	<p>K7. Understands the impact of emerging technological changes, for example AI, in terms of how product is sourced, how buying and merchandising processes might be improved, and how they might impact on customers</p> <p>B1. Acts as an ambassador for the buying and merchandising function and the business</p>	Identifies where changes in technology are used to source products and how these changes impact on their customers.	Analyses where use of new technology has had the potential to have a negative impact on the customer and they used their role to reduce the impact and ensure that their customers remained loyal to them.
Make informed managerial decisions that mitigate risk, drive sales and profitability, taking into account the requirements of different customer delivery channels.	S11. Through their influence as a leader, looks to use digital opportunities to drive sales and profitability across all channels where appropriate	Demonstrates understanding of team and role in order to design key objectives for specific products so that they will exceed forecasted sales levels, this should include the digital opportunities they have used to make the predictions and the channels they impacted on.	Applies theory with insight and awareness of risks and rewards, describing how theory was applied with clear analysis of the impact and risks.
Drive sales and profitability through	K16. Understands the importance of effective	Describes how they manage and build on-going relationships with	Investigates innovative techniques and evaluates their suitability for use

<p>effective negotiations with suppliers on key deliverables such as: capacity, cost price and flexibility, re-buys, cancellations, delivery dates, lead times, promotion support etc.</p>	<p>negotiation and managing an ongoing relationship, including with designers, manufacturers and suppliers.</p> <p>K47. Knows how to effectively build relationships with key external stakeholders</p> <p>S12. Demonstrates how to negotiate in a manner that obtains the optimum outcome for the business</p> <p>S50. Assess the impact that they have on key external relationships, and adjusts their style to ensure that they achieve maximum benefit for the business</p> <p>B4. Builds relationships across the whole function and beyond.</p>	<p>key stakeholders when negotiating and how they adjust their behavior and style to ensure that they achieve the optimum outcome for the business.</p> <p>Uses an example to demonstrate when they have negotiated with a supplier and the importance of adjusting their style to build relationships and to maximize benefits for the business.</p>	<p>within the context of their discipline. Takes a leadership role in justifying the use of such tools and techniques and supporting the organisation in achieving benefits from using them.</p>
<p>Manage and collaborate with key internal stakeholder functions to agree appropriate promotional strategies and other activities to maximise the success / profitability of the allocated assortment.</p>	<p>S13. Through their leadership and management of the team, demonstrates a strategic approach to the relationship with other departments.</p> <p>S14. Anticipates potential problems and opportunities through the effective liaison</p>	<p>Demonstrates how they use their role as an ambassador for the organisation, to lead their team ensuring they build strategic relationships with other departments.</p> <p>Identifies potential problems and is able to outline opportunities to resolve them by working in</p>	<p>Responds to questioning with the ability to argue and defend their view while showing respect for the opinions of others.</p> <p>Applies best practices with a disciplined and responsible approach to avoid risk through application of</p>

	<p>at the appropriate level with other teams / functions.</p> <p>B1. Acts as an ambassador for the buying and merchandising function and the business</p>	<p>partnership with other teams and functions.</p>	<p>leadership skills and mitigation strategies.</p>
<p>Deliver robust range building and planning for the assigned assortment, linking it in to the wider operation of the buying and merchandising function.</p>	<p>K19. Understands why effective planning and forecasting are vital to delivering a robust range plan, such as aspects of customer demand and changes in buying patterns.</p> <p>S15. Critically reviews and revises plans and forecasts for the function, taking into account the latest trend analyses, to produce the range.</p>	<p>Delivers clear plans for products ranges which include customer demand and buying patterns, justifying where they undertake continual reviews and revisions to ensure that delivery is met.</p>	<p>Predicts when customers demand and buying patterns will change on products, and analyses plans to ensure they continually link with the wider buying and merchandising function.</p>
<p>Lead, coach, manage, motivate and develop self and team members to achieve personal and business success.</p>	<p>K20. Understands the importance of, and strategies to, lead, coach, motivate and develop members of the team</p> <p>K21. Understands the importance of leadership style and self - development, on the success of the business</p>	<p>Uses an example to show how their own self-development has an impact on the success of the business and opportunities they have taken to develop themselves and their team.</p> <p>Recognises and uses an example to explain the impact they have as a leader and how they use this to develop relationships with key stakeholders</p>	<p>Compares a range of development principles and techniques to enhance the robustness of decisions and relationship building, is able to critique the various options and provide supporting evidence for justifying and defending preferred option.</p>

	<p>K46 Understands the impact that they have as a leader on the business,</p> <p>S16 Develops and implements a 'People Plan', that is effective in ensuring sufficient team capacity and capabilities to deliver on business objectives</p> <p>S17. Demonstrates an effective leadership style in achieving the key business objectives.</p> <p>S18. Ensure continuous personal and team development to enhance delivery</p> <p>B3. Seeks opportunities to develop themselves and the team</p>	<p>Uses an example to describe what they have done to develop themselves and their team, how they identify what development is required and how this links to achieving key business objectives.</p>	
--	--	--	--

Option 1 Assistant Buyer - grading descriptors

Area of Assessment	Knowledge, Skills, Behaviours	Pass Criteria – The apprentice's project must demonstrate that they:	In order to achieve a distinction, all of the pass criteria, 9 of the core distinction criteria and all 3 distinction criteria for the chosen option mapped against this assessment method must be met.
Developing own brand products to meet current trends /	K24. Understand how to identify current and future buying and loyalty	Details how they use their role as an ambassador for the organisation when developing own brand	Evaluates current and future buying and loyalty behaviors and uses this information to make judgments on

customer requirements, linked to strategy and financial targets.	behaviours of existing and potential customer groups. S23. Work in partnership with the customer engagement team to achieve better outcomes for both existing and new customer groups.	products and how this can affect the buying and merchandising process. Demonstrates how they work in partnership with the customer engagement team to identify buying and loyalty behaviours of their existing customers and what outcomes they need to improve to existing groups and to attract new customer groups.	products linking them to future business strategies and financial targets.
Ensure department is set up to maximise sales / profitability by using techniques such as pricing strategies, product trends, product design and appropriate routes to market. Ensure they and their team deliver in an ethical, sustainable and legal way in the sourcing of product ranges, aligned to the overall strategy of the business.	K26 Understands the roles that techniques such as business planning, pricing strategies, product design and product manufacture, often in a global context, have on the overall success of the business	Use an example to show what opportunities they seek to develop the skills/knowledge of themselves and their team to ensure that they continually source ethical and legal product ranges that align to the strategy of the business.	
Analyse and evaluate overall performance of the Buying	S28. Anticipates the need for products and to ensure that the buying process	Analyses future needs for products to ensure that it is available for the customer.	Interprets information on product development to identify when a product is not successful and is not

function, against the original strategy and business plan, identifying lessons to learn for future business cycles.	enables their effective delivery to the customer S29. Can articulate a supported recommendation regarding the introduction or withdrawal of a product / product range.	Evaluates performance of a product so that they can use the information to recommend the withdrawal of an existing product or the introduction of a new product.	selling. Uses this information to make recommendations for change to future business cycles and what impact this had on new product cycles.
Ensure ranges are sourced to comply with relevant safety and quality standards. Oversee the process to identify and rectify any failures in safety and / or quality.	K33. Understands the process that is required to ensure the rectification of any failures S30. Ensures compliance with company operating standards in the sourcing of range.	Describes how they work with new suppliers to ensure they comply with both internal and external standards; including where additional compliance practice may be needed. Describes when, as a leader, they have taken responsibility to rectify any failures with compliance and what this meant on being able to source the range.	
Source and select 3rd party products to meet current trends / customer requirements, linked to strategy and financial targets.	S32. Effectively analyses the key buying criteria to help shape the planned product range for 3rd party products	Outlines how they analyse key buying criteria to produce and develop a planned product range for 3 rd party suppliers, detailing what current and future buying loyalties they had to take into account for both the customer and product.	Justifies the decisions they make on planning product ranges and the impact they have had on the organisation. Detailing any recommendations they would make for changing current practice and the impact of this.
Ensure they and their team work in an ethical and legal way in the supply of	K32. Understand where additional corporate requirements are needed to	Demonstrates how they seek development opportunities for themselves and their team to ensure they fully understand the	

product ranges, aligned to the overall strategy of the business.	enhance compliance practice	implications of concepts such as “modern slavery” when sourcing products and what impact it would have on the business of the products were sourced incorrectly.	
Ensure ranges are sourced to comply with relevant safety and quality standards. Oversee the process to identify and rectify any failures in safety and / or quality.	K31. Understands the importance of onboarding new suppliers to ensure full compliance with internal and external standards	Describes how they work with new suppliers to ensure they comply with both internal and external standards; including where additional compliance practice may be needed. Describes when, as a leader, they have taken responsibility to rectify any failures with compliance and what this meant on being able to source the range.	

Option 2 Assistant Merchandiser - grading descriptors

Area of Assessment	Knowledge, Skills, Behaviours	Pass Criteria – The apprentice’s project must demonstrate that they:	In order to achieve a distinction, all of the pass criteria, 9 of the core distinction criteria and all 3 distinction criteria for the chosen option mapped against this assessment method must be met.
Uses analysis to develop range framework identifying commercial opportunities. Collaborate with the buying team to input into or create a plan to deliver a	S33. Has the ability to ensure that the right product is available at the right time, in the right place. S34. Produces and delivers accurate forecasts which demonstrate creative and	Justifies their role on ensuring that the correct products are available when required and why it is important they accurately forecast creative and ambitious suggestions for future strategies. This should include why this is underpinned by the business strategy and financial considerations.	

commercial assortment that maximises sales and margin	ambitious suggestions for future strategy S36. Demonstrates the activities needed to ensure that the forecast is underpinned by financial considerations and business strategy.		
Ensure they and their team work in an ethical and legal way in the supply of product ranges, aligned to the overall strategy of the business.	K36. Understands the potential problems that can arise in merchandising and how they can be mitigated. K37. Understands concepts such as 'Modern Slavery' and how they might impact on the business S38. Ensures that all team members operate within current legal guidance. S39. Operates to, and ensures relevance of company operating standards	Demonstrates how they seek development opportunities for themselves and their team to ensure they fully understand the implications of concepts such as "modern slavery" when sourcing products and what impact it would have on the business of the products were sourced incorrectly.	
Trades effectively delivering to sales and profit targets whilst identifying and taking relevant actions, to account for market and performance factors.	K40. Understand merchandising concepts such as 'fixturation', and the effective use of space S40. Makes commercial decisions based on product, category and departmental performance	Describes how they use merchandising concepts when making business decisions on products and how these affect departmental performance. Uses an example to details how they make use of space to maximize trading opportunities for	Evaluates and analyses data to predict sound commercial outcomes on product and departmental performance in order to recommend on-going changes to improve/increase sales and profitability.

	<p>S41. Maximises every trading opportunity in order to deliver sound commercial outcomes for the organisation</p> <p>S42. Using IT skills, develop strong spreadsheet / pivot table creation knowledge to enhance and optimize reporting and analysis data, so as to improve sales and profitability.</p>	<p>products and to deliver sales and profitability.</p> <p>Develops spreadsheets and reports to highlight where sales can be improved.</p>	
<p>Analyse and evaluate overall performance of the merchandising function, against the original strategy and business plan, identifying lessons to learn for future business cycles in order to maximise sales</p>	<p>K41. Understands the impact of effective forecasting on the operation of the merchandising function.</p> <p>S43. Anticipates the need for products and ensures that the buying process enables their effective delivery to the customer</p> <p>S44. Prepare executive level reports on current and forecasted performance, and using advanced presentation skills, ensure the communication of the outcomes is delivered in the most effective and profitable way.</p>	<p>Uses an example to show when they have produced a strategic report to review and revise a system that has failed to function correctly and how they have communicated the outcomes of their findings.</p> <p>Outlines how they use forecasting within their function to liaise with key stakeholders to develop joined up approaches across the business on shared product ranges.</p>	<p>Evaluates a product where detailed forecasting had not been undertaken, what the impact this had on the function and stakeholders; and what actions the organisation took as a result of these findings.</p>

<p>Ensure the availability of appropriate product range to meet customer demand and expectations across all delivery channels. This to be achieved, through detailed forecasting, and management of the WSSI, supplier interaction and critical path management</p>	<p>K42. Understands in depth, the purpose of the critical path</p> <p>K43. Understands supplier data, such as delivery intakes, packaging requirements etc.</p> <p>K44. Understand differing requirements across all methods of delivery (eg instore and on line)</p> <p>S46. Delivers to the critical path plan in order to ensure that delivery deadlines are met, and that intakes meet stock levels</p> <p>S47 Delivers timely and accurate forecasts to ensure that customer needs are met.</p> <p>S48. Communicates directly with suppliers to ensure receipt of stock</p>	<p>Outlines the purpose of the critical path and how they used this and supplier data to determine the differing requirements across all delivery methods.</p> <p>Describes how they communicate with suppliers to ensure that stock levels are met and received correctly within deadlines.</p>	<p>Uses an example to detail what impact it has on the business when stock levels are not delivered correctly. What actions are they responsible for when this happens and what actions do they take to reduce the risk of this happening.</p>
---	--	--	--