

Level 2 Retailer

EPA-Kit

Assessing the Practical Observation

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The Practical Observation – Guidance

The end-point assessment plan states that the practical observation should be no longer than 2 hours, will be pre-planned and scheduled at a time when the apprentice will be in their normal place of work and must include customer interaction and 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. The end-point assessor will carry out the practical observation which should enable the apprentice to evidence their skills, knowledge and behaviour from across these standards to demonstrate genuine and demanding work objectives. It is mandatory that the observation covers the customer, business, communication, brand reputation aspects of the standard. Examples of observed practice include handling a general enquiry, dealing with a customer complaint or a need for further information or detail.

Before the assessment

- Employers/training providers should plan a relevant observation activity, or series of activities, that provide the apprentice with the opportunity to demonstrate each of the required standards outlined in the following pages. The practical observation activities should provide the apprentice with opportunities to:
 - show direct customer contact
 - show contact with team members
 - make decisions

During the practical observation, where possible, situations and evidence should be naturally occurring, however, to ensure that all criteria can be covered, some simulation will be allowed to ensure total coverage of the standards. This can be arranged before the assessment takes place to give the best opportunity for all criteria to be met.

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- brief the apprentice on the activities to be carried out and the duration of the assessment (a minimum of 1 hour)
- ensure the apprentice knows which retailer criteria will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience in preparation for their assessment
- 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.

It is suggested that a mock assessment is carried out by the apprentice in advance of the end-point assessment with the training provider/employer giving feedback on any areas for improvement.

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages.

Apprentices meeting all pass criteria will be awarded a pass, if all pass and all distinction criteria are met, then the result will be a distinction.

The Practical Observation - Mock Assessment

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommend that the apprentice experiences a mock practical observation in preparation for the real thing. The most appropriate form of mock assessment will depend on the apprentice's setting and the resources available at the time. In designing a mock assessment, the employer/training provider should include the following elements in its planning:

- the mock observation should take place in a real workplace, or a realistic simulation if the real workplace does not present all the required assessment opportunities
- the participation of other personnel to play the parts of customers and team members
 - It is strongly recommended that the mock observation has been practiced beforehand and all personnel involved are properly briefed on their roles
 - The roles should provide the opportunity for the apprentice to demonstrate both the "pass" level and the "distinction" level criteria
- a 2-hour time slot should be available for the complete practical observation, if it is intended to be a complete mock observation covering all relevant standards. However, this time may be split up to allow for progressive learning
- consider a video recording of the mock assessment, and allow the it to be observed by other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. The mock assessment sheets later in this guide may be used for this purpose.

A suggestion on the split of the 2 hour time slot could be

- till point/ payment 15 to 20 minutes, this may cover:
 - Communication
 - Brand Reputation
 - Finance
 - Legal
 - Technical
- On the shop floor re-stocking and filling up shelves 30 to 40 mins, this may cover:
 - Marketing
 - Legal
 - Environment
 - Merchandising

- Up to an hour should be spent on the shop floor interacting with customers, this may cover:
 - Customer
 - Sales
 - Business
 - Product
 - Team
 - Diversity

Practical Observation Criteria

During the practical observation, which will last for 2 hours, the following standards should be evidenced. Apprentices should prepare for the practical observation by considering how the criteria can be met. The apprentice can only achieve a distinction by covering all pass and all of the distinction criteria listed

Customer	
To pass, the following must be evidenced	To gain a distinction
CS1 Make every interaction with a customer an opportunity to increase, gain, maintain or re-establish their loyalty	CS12 Go beyond customers' expectations giving at least one example: how, what here when e.g. turned a complaint into an opportunity to retain customer CS13 Uses initiative to improve sales and/or customer service
CS2 Clearly communicate accurate, relevant and helpful information to customers, checking their understanding	
CS3 Ask appropriate questions in order to help customers	
CS4 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	
CS5 Deliver excellent customer service in line with the business' culture and values in all activities	
CS6 Present the culture of the organisation through own personal presentation and interaction with customer	
CS7 Listen to and deal with customers' questions, queries and complaints effectively in line with business requirements	
CS8 Use methods of communication and rapport building that are in line with the business and adapt accordingly to different customers	
CS9 Use the business offer to support efforts to enhance customer loyalty	
CS10 Utilise understanding of customer profiles by quickly identifying what the customer needs and offering options that will meet or exceed their expectations	
CS11 Take a positive approach to receiving feedback and learn from the experience to improve own customer service offer	

Communications	
To pass, the following must be evidenced	To gain a distinction
<p>CO6 Communicate with an awareness of the situation, adapting as necessary, and responding appropriately</p> <p>CO7 Support customer interactions by adapting body language and tone to the person/people being served</p> <p>CO8 Use a range of communication styles according to the person being communicated to</p> <p>CO9 The typical style and methods of communication used by the business</p> <p>CO10 Has an awareness of own communication style and how to manage it depending on the circumstances</p> <p>CO11 Demonstrate empathy for the person being communicated with</p>	<p>CO12 Recognised by all (e.g. customers, team, management) as “great” with people</p> <p>CO13 Demonstrates outstanding communication skills internally and externally</p>

Business	
To pass, the following must be evidenced	To gain a distinction
<p>BU9 Interact with customers and build a rapport in a way that demonstrates an understanding of the business vision, objectives and brand standards</p> <p>BU10 Use service techniques and procedures that deliver the brand standards</p> <p>BU11 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)</p>	<p>BU12 Consistent representation of the business values</p> <p>BU13 Being proud and passionate as a brand ambassador</p>

Brand Reputation

To pass, the following must be evidenced	To gain a distinction
<p>BR4 Uphold and personally demonstrate a positive brand and business reputation at all times</p>	<p>BR5 Understand how the following impact on brand and business reputation and how to apply then in own organisation: - media and social media - business ethics and corporate social responsibility - political action such as sabotage or terrorism - impact of business activities on people and the environment</p> <p>BR6 Know how to and the importance of reporting situations that threaten brand and business reputation in a timely manner to the appropriate person</p> <p>BR7 Know how to and the importance of following business policy/procedure if approached by the media</p> <p><i>BR8</i> Follow procedures to prevent the misuse of social media</p>

Sales and Promotion

To pass, the following must be evidenced	To gain a distinction
<p>SP4 Selects and uses a range of selling techniques appropriate to situation, product and/or service being sold</p> <p>SP5 Talks to customers to identify sales opportunities</p> <p>SP6 Takes opportunities to increase the size of the sale (e.g. basket size, promoting offers and biproducts)</p> <p>SP7 Actively sells without intimidating or pressurising the customer</p>	<p>There are no distinction criteria for this component</p>

Financial

To pass, the following must be evidenced	To gain a distinction
<p>FN8 Use methods that will enhance sales and reduce costs for the business whilst delivering great customer service</p> <p>FN9 Use methods of financial control that are appropriate to the style of the business</p> <p>FN10 Use methods of work that will meet or exceed financial targets</p> <p>FN11 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</p> <p>FN12 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)</p> <p>FN13 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)</p>	<p>FN14 Uses own initiative to have impact on one or more of the following:</p> <ul style="list-style-type: none"> • Sales increase • Waste reduction • Quality of customer experience and retention • Cost efficiency

Marketing	
To pass, the following must be evidenced	To gain a distinction
<p>MA7 Use accurate information to explain product and service offers (e.g. the period the offer/promotion is available for), and price comparisons to customers</p> <p>MA8 Openly share knowledge with colleagues and customers</p> <p>MA9 Select best method of promoting a product or service to support business objectives</p> <p>MA10 Take every opportunity to promote the unique selling point of the business and or its products/services</p>	<p>MA11 Makes recommendation to improve marketing and promotion with examples given from continual assessment</p>

Legal and Governance	
To pass, the following must be evidenced	To gain a distinction
<p>LG9 Maintain the confidentiality and security of customer data when recording, retaining and sharing information</p> <p>LG10 Follow business procedures to comply with consumer protection law</p> <p>LG11 Follow business health and safety procedures when carrying out work activities</p> <p>LG12 Identify health, safety and security risks and minimise, deal with or report to the appropriate person in line with own limits of authority</p> <p>LG13 Deal with accidents and emergencies calmly and in line with business procedures</p> <p>LG14 Promote a safe and secure working environment through setting an example to others</p>	<p>There are no distinction criteria for this component</p>

Product and Service

To pass, the following must be evidenced	To gain a distinction
<p>PS1 The importance of up to date product/service knowledge</p> <p>PS2 Where to identify product/service knowledge</p> <p>PS3 How to keep up to date on business brands, products and services e.g. notice boards; internal newsletters; intranet; team briefings</p> <p>PS4 Key facts of product/service knowledge needed to support and complete sales</p> <p>PS5 If and how the product fits into a wider range of products and the differences/links between them</p> <p>PS6 The importance of identifying customer needs in order to sell products and services that will meet and /or exceed their expectations</p> <p>PS7 How to link product features and benefits to customer needs and profile</p> <p>PS8 Ask customers questions about the products/services they are looking for and the features and benefits that will meet or exceed their needs</p> <p>PS9 Identify products/services which match customer requirements</p> <p>PS10 Discuss relevant options, giving customers opportunities to ask questions and clarify information</p> <p>PS11 Close the sale with the customer, confirming what they want to buy and provide relevant information e.g. any relevant customer rights</p> <p>PS12 Decide if it is appropriate to sell additional bi products/services to the customer and highlight them accordingly</p> <p>PS13 Displays energy and motivation</p> <p>PS14 Has pride in the delivery of products and services</p>	<p>PS15 Comprehensive range of product, knowledge and understanding can be demonstrated over and above what a customer can find for themselves</p> <p>PS16 Breadth of knowledge around benefits, insight into usefulness of product specs</p> <p>PS17 Use of devices and relevant merits of each</p> <p>PS18 Genuine rapport with customer and going off script when engaging with them</p> <p>PS19 Accurately describe the features and benefits of relevant products to customers in a way which helps them identify the differences</p> <p>PS20 Can clearly and accurately summarise information to others in a way which is easily understood</p>

Merchandising	
<i>To pass, the following must be evidenced</i>	<i>To gain a distinction</i>
ME4 Identify key areas to achieve maximum visual impact and create a display area that optimises the merchandise; props and materials and is aesthetically pleasing	ME13 Understand how to plan and install window and store displays effectively and safely
ME5 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)	ME14 Understand how to maximise the creative use of space through the layout of the designated display area
ME6 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)	ME15 Understand the importance of and know how to prepare products for display
ME7 Follow business guidelines for displaying stock	ME16 Understand how props and events are used in merchandising
ME8 Conduct checks to ensure the display result is safe, neat and tidy, clean, finished on time and in line with business expectations	
ME9 Maintain the display area so that at all time its presentation is in line with business expectations	
ME10 Evaluate the effectiveness of the window display in supporting the intended merchandise and brand	
ME11 Analyse feedback and respond appropriately making suggestions for improvements	
ME12 Listen, reflect and respond positively and constructively to feedback	

Team	
<i>To pass, the following must be evidenced</i>	<i>To gain a distinction</i>
TE16 Balance own priorities/work objectives at the same time as supporting team members as agreed	TE22 Get involved in planning and leading sections meetings
TE17 Keep team members informed on the progress towards joint tasks	TE23 View difficult situations and issues from colleagues' perspective and provide support, where necessary, to move things forward
TE18 Determine when and how to communicate matters that have implications on the business e.g. relating to service, safety and quality	TE24 Identify conflicts of interest and disagreements with colleagues and respond to them in ways that minimise impact on the work being carried out
TE19 Share knowledge and information with team members, selecting the appropriate communication method and time of day	TE25 Provide feedback to colleagues on their performance and encourage them to feedback on own performance in order to identify areas for improvement
TE20 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)	TE26 Identify potential conflicts and take action to reduce or eliminate them
TE21 Effectively participate in briefings/meetings, actively listening and asking questions to confirm understanding	

Technical	
<i>To pass, the following must be evidenced</i>	<i>To gain a distinction</i>
TC2 Identify types of technology and their uses in different types of business operation TC3 Identify technology and its uses within the business TC4 How to use relevant technology correctly TC5 Strictly follow instructions and procedures, including safety, when using technology TC6 Use technology safely and appropriately TC7 Identify the technology in the work environment and use it efficiently and effectively TC8 Know what to do when technology fails TC9 How technology supports the effective and efficient sale of products and services to customers	There are no distinction criteria for this component

Diversity	
<i>To pass, the following must be evidenced</i>	<i>To gain a distinction</i>
DI9 Use a range of communication styles to suit the person you are talking to DI10 Adapt communication in different contexts DI11 Make enough time and effort and respond flexibly and positively so that own working practice engages all customers DI12 Seek clarification and manage situations DI13 Use techniques to minimise misunderstanding and improve communication DI14 Demonstrate fairness and integrity in all work activities DI15 Display empathy towards others	There are no distinction criteria for this component

Environment	
<i>To pass, the following must be evidenced</i>	<i>To gain a distinction</i>
<p>EN9 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</p> <p>EN10 Monitor stock/resources (and where relevant equipment that stock is contained within) as required by the business to ensure it maintains its quality</p> <p>EN11 Deliver service in a manner that minimises overall waste but is always in the best interest of the customer</p> <p>EN12 Take measures to prevent wastage</p> <p>EN13 Follow business requirements to identify and record the causes of wastage</p>	<p>There are no distinction criteria for this component</p>