

# Level 2 Retailer

EPA-Kit

## Assessing the Professional Discussion

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## The Professional Discussion - Guidance

The end-point assessment plan states that the professional discussion will be a structured discussion between the apprentice and the end-point assessor. The employer may be present, to support, but not lead the apprentice and to confirm information, at the assessor's request.

The employer will not be allowed to add any further information or examples to what the apprentice has stated or lead them in any way. Highfield would encourage the employer/training provider and the apprentice to plan for the professional discussion and consider what resources they may bring with them to support them during their professional discussion. This must be their own work and will only be used to support their discussion. The professional discussion should take place after the practical observation, to establish the apprentice's understanding and application of the remaining knowledge, skills and behaviours.

The professional discussion will need to take place in a suitable environment and should last for 1 hour. The discussion will be against the set criteria that is outlined in the following pages and it will be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence. It will include areas of the standard not seen in the observation plus key additional areas identified in the criteria section of this document.

The purpose of the professional discussion is to clarify any questions the end-point assessor has for specified standards:

- confirm and validate judgements about the quality of work
- explore aspects of the work, including how it was carried out, in more detail
- discuss how the apprentice would behave in specific scenarios, should they not have occurred within the practical observation
- ask questions in relation to personal development and reflection
- provide a basis for the end-point assessor to make a decision about the grade to be awarded

### **Before the assessment:**

Employers/training providers should:

- plan the professional discussion to allow the apprentice the opportunity to demonstrate each of the required standards
- ensure the apprentice knows the date, time and location of the assessment
- 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 as preparation for this assessment

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, and if all of the distinction criteria are also met the result will be a distinction.

For retailers working in a remote environment, such as in telephone, on-line and mail order retail it is recognised that opportunities to control physical stock items and storage areas, particularly if selling a utility or service rather than a product, may be limited. All apprentices must have a full knowledge and understanding of stock as detailed in the apprenticeship standard and how this applies within their environment.

## Professional Discussion – Mock Assessment

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommend that they experience a mock professional discussion 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 consider the following elements in their planning:

- the participation of other personnel to play the parts of customers and team members
  - it is strongly recommended that the mock professional discussion 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 1-hour time slot should be available for the complete professional discussion, if it is intended to be a complete mock assessment covering all relevant standards, however this time may be split up to allow for progressive learning
- consider an audio recording of the mock, and to allow the mock 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 document sheets later in this guide may be used for this purpose
- structured 'open' questions should be used as part of the professional discussion which do not lead the candidate, but allows them to express their knowledge in a calm and comfortable manner, some examples of this may include the following:

- **Business**
  - Does your company have a mission statement?
  - What does the mission statement mean to you?
- **Stock**
  - How often is stock delivered to this store?
  - How does it arrive?
- **Customer**
  - How could you ensure that each customer has a positive experience within this store?
  - Describe your typical customer

## Professional Discussion Criteria

Throughout the 1-hour professional discussion, the assessor will review the apprentice's competence in all of the pass criteria outlined below as a minimum, therefore apprentices should prepare for the professional discussion by considering how the criteria can be met. The apprentice can only achieve a distinction by covering all of the distinction criteria, which is outlined in the distinction column.

To pass, the following must be evidenced	To gain a distinction
<b>Customer</b>	
<p>CS1 The key features and benefits of excellent customer service as defined by the business and in contrast to other businesses in the industry</p> <p>CS2 The importance of excellent customer service to business success and the implications of poor customer service</p> <p>CS3 The importance of repeat business and ways to encourage customer loyalty in the retail industry</p> <p>CS4 What is meant by a 'customer experience'</p> <p>CS5 Where to find information on customers within the business</p> <p>CS6 Typical customer profile(s)</p> <p>CS7 An appreciation of different types of customer, their motivation to purchase products/service and their different needs</p> <p>CS8 The unique needs of certain customers and how to help them in line with business procedures and environment</p> <p>CS9 How to recognise and adapt approach to different customer behaviours, emotions and emotive needs</p> <p>CS10 Different methods customers want to use to purchase products</p> <p>CS11 How customers' purchasing habits are influenced through social trends and the media</p> <p>CS12 How the culture of different businesses impacts on the style of interaction with customers</p>	<p>There are no distinction criteria for this component</p>

To pass, the following must be evidenced	To gain a distinction
<b>Business</b>	
<p>BU1 Where to identify the vision, objectives and brand standard/style of the business</p> <p>BU2 The purpose of a <b>vision statement</b>, the benefits to the business as a whole and how it impacts on own role</p> <p>BU3 The purpose of setting objectives and why they are important for businesses to be successful</p> <p>BU4 How objectives relate to own role in the business</p> <p>BU5 The importance of the business <b>brand standards</b>, in relation to the product and/or services it offers</p> <p>BU6 Positively presents the business <b>brand standards</b> in all communications with customers</p> <p>BU7 Has a conscientious attitude to deliver <b>brand standards</b> and protecting the reputation of the business, for example always following service expectations or procedures</p> <p>BU8 Operates in an <b>accountable manner</b> taking ownership for own actions and their implications on the business</p>	<p>There are no distinction criteria for this component</p>

To pass, the following must be evidenced	To gain a distinction
<b>Marketing</b>	
<p>MA7 What the unique selling point of the business is and how it compares to other organisations</p> <p>MA8 How businesses are positioned in the wider market alongside competitors</p> <p>MA9 How to promote products and services to achieve business objectives</p> <p>MA10 Where in the business to find the latest guidance and information on promotions and advertising campaigns</p> <p>MA11 How the business compares with its competitors in terms of <b>product offer</b>, pricing and service</p>	<p>There are no distinction criteria for this component</p>

To pass, the following must be evidenced	To gain a distinction
<b>Sales and Promotion</b>	
<p>SP1 How sales targets differ according to the <b>retail calendar</b></p> <p>SP2 Own contribution to meeting sales targets</p> <p>SP3 Different <b>selling techniques</b> and how and when to use them</p>	<p>There are no distinction criteria for this component</p>

To pass, the following must be evidenced	To gain a distinction
<b>Brand Reputation</b>	
BR9 Deal with relevant situations that may affect brand reputation in line with company policy	There are no distinction criteria for this component

To pass, the following must be evidenced	To gain a distinction
<b>Stock</b>	
<p>ST4 Check storage areas are clean, tidy and have sufficient space for stock being delivered and deal with in line with business procedures if not</p> <p>ST5 Check delivery or holding areas are clean and tidy and necessary unloading equipment is available and in working order</p> <p>ST6 Check stock on delivery to make sure it is of the correct type, quantity and quality ordered</p> <p>ST7 Deal with incorrect type or quantities, faulty or substandard stock in line with business procedures</p> <p>ST8 Manage stock and carry out <b>correct rotation procedures</b> to maintain quality and prevent loss, damage or deterioration</p> <p>ST9 Complete all paperwork and records accurately and clearly in line with <b>business requirements</b></p> <p>ST10 Follow the <b>business requirements</b> for the security of the storage of stock</p> <p>ST11 Has the confidence to return incorrect, faulty or substandard goods</p> <p>ST12 Takes a calm and considered approach when issues occur, minimizing the risk or disruption caused</p>	<p>ST13 Shows integrity, fairness and consistency in decision making</p>

To pass, the following must be evidenced	To gain a distinction
<b>Team</b>	
<p>TE1 What makes an effective team and what is meant by team dynamics</p> <p>TE2 Ways in which team members/teams work together, interact and provide support to each other to meet business objectives</p> <p>TE3 The implications when team members do not work together</p> <p>TE4 Different methods, including the use of effective negotiation, to positively influence a team</p> <p>TE5 The importance of positive listening, valuing difference of opinion and challenges in order to reach suitable agreements/actions</p> <p>TE6 The roles and responsibilities of team members</p> <p>TE7 The information and resources that colleagues may need and where to obtain it if not known</p> <p>TE8 The importance of fulfilling agreements made with team members or keeping them informed if there is a problem</p> <p>TE9 Build <b>effective working relationships</b> with all team members</p> <p>TE10 Set an example to others through a professional and positive approach to all work activities</p> <p>TE11 Strengthen <b>team dynamics</b> agreements, taking a fair approach</p> <p>TE12 Demonstrate an interest in other team members' roles and how they relate to own</p> <p>TE13 Take a positive approach to helping team members to support the business, offering help to busy team members where possible</p> <p>TE14 Co-operate with team members at all levels</p> <p>TE15 Actively support other team members' learning</p>	<p>There are no distinction criteria for this component</p>

To pass, the following must be evidenced	To gain a distinction
<b>Performance</b>	
<p>PE1 How work objectives are agreed and recognise the benefits they can bring to the individual and the business</p> <p>PE2 How own roles and responsibilities impact on team goals</p> <p>PE3 The benefits to the business of more effective ways of working</p> <p>PE4 The benefits of performance improvement to the individual and business</p> <p>PE5 The benefits of a personal development plan</p> <p>PE6 How to identify own learning needs and improve own performance</p> <p>PE7 Demonstrate drive and commitment</p> <p>PE8 Take ownership for own performance and personal development</p>	<p>PE9 Seeks opportunities for going beyond the basic requirements of the role</p> <p>PE10 Identifies and takes opportunities that will develop self. These could be internal or external (such as the Duke of Edinburgh Award) but must clearly link to development in an increase in performance at work</p>

To pass, the following must be evidenced	To gain a distinction
<b>Technical</b>	
<p>TC1 Takes action quickly and decisively when issues occur</p>	<p>There are no distinction criteria for this component</p>

To pass, the following must be evidenced	To gain a distinction
<b>Diversity</b>	
<p>D11 Different diverse cultures and backgrounds dependent on local demographics of the business</p> <p>D12 Implications of relevant diversity and equality legislation</p> <p>D13 Understand the importance of and how to follow policy in relation to equality and diversity</p> <p>D14 What local demographics mean in relation to the business products and services</p> <p>D15 The importance of understanding customers and local demographics to business success</p> <p>D16 Identify how to listen in a non-judgemental manner</p> <p>D17 How own use of language, body language, gestures and tone of voice may appear to customers and colleagues; and how theirs may affect your perceptions of them</p> <p>D18 How to contextualise conversations</p>	<p>There are no distinction criteria for this component</p>

To pass, the following must be evidenced	To gain a distinction
<b>Environment</b>	
EN3 The purpose and process of waste control and stock taking requirements of the business	There are no distinction criteria for this component
EN4 The re-using and re-cycling expectations within the business and why these are important	
EN5 The principles or policies of the business relating to the environment and why it's important to follow them	
EN6 Actively promotes environmental initiatives /projects in the business	
EN7 Sets an example to others by working responsibly and efficiently to avoid waste, encouraging team members to do the same	
EN8 Take opportunities to use more environmentally aware methods in all work activities	