

Ref	Assessment Criteria	Evidence Ref	Location/ Page in evidence
Knowledge and understanding of the organisation			
OK1a	State the aims of the organisation in relation to its sector and explain why the organisation's core values are linked to its success		
OK2a	Explain the organisation's process to provide customers with products obtained from manufacturers		
OK3a	Describe the opportunities available in the organisation to gain and maintain knowledge about the products/service offer to customers		
OK4a	Give examples of how relevant legislation and regulations affect the organisation, and how they are maintained through the organisation's internal policies		
OK5a	State their responsibilities for keeping brand and business reputation safe from risk		
OS1a	Explain the organisation's service offer to internal and external customers and how the organisation operates in line with its standards		
OS2a	Explain who should be notified in a situation that poses a risk to the organisation		
Distinction			
OK1b	<i>Share ideas of how their role can improve success of their organisation</i>		
OK2b	<i>Describe the process for obtaining goods for a customer which are not stocked items</i>		
OK3b	<i>Proactively seek to further specialist product knowledge to improve customer experience and business performance</i>		
OK4b	<i>Explain the potential impact on the organisation if it fails to adhere to relevant legislation and regulations</i>		
OK5b	<i>Explain how to identify any potential risks to the brand and business reputation and propose possible solutions</i>		
OS1b	<i>Communicate confidently about the organisation's position in the external market and wider sector including competition and changing sector landscapes, such as new technologies and online trade</i>		
OS2b	<i>Actively monitor situations that pose potential risk and take responsibility to ensure these are resolved</i>		
Knowledge and understanding of the specialist trade customer profile of the business			
CK3a	Explain the difference between internal and external customers in the context of their organisation		
CS2a	Supply a service/product range to the customer that is not normally available		
Distinction			
CK3b	<i>Explain the difference in the way internal and external customer relationships are managed</i>		
CS2b	<i>Exceed customer expectations in the presentation of solutions that include a range of products and services, the relevant merits of each, alternatives and complementary products and services available</i>		
Knowledge and understanding of trade counter and telesales services and how to			
SS5a	Display an understanding of the importance of clean and tidy housekeeping		
SS6a	Occasionally offer associated products to complement those requested by the customer		

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SS8a	Demonstrate an understanding of systems and procedures involving documentation as well as company policy on document and information retention		
SS9a	Demonstrate awareness of legislation and treat confidential information correctly in line with company policy		
Distinction			
SS5b	<i>Demonstrate how to maximize the creative use of space throughout the display area</i>		
SS6b	<i>Always use upselling and link selling techniques with all customers in order to secure, complete and increase sales transactions</i>		
SS8b	<i>Provide ideas of how working practices could be improved, providing cost and time-saving efficiencies to the business</i>		
SS9b	<i>Use own initiative to protect confidential information and reassure customers of the procedures in place in line with company policy. Explain the key standards and rights regarding data protection and security</i>		
Knowledge and understanding of the technologies that are appropriate to the role			
TK1a	Describe benefits of the use of technology in interactions in the workplace and indicate instances when direct interaction is preferable		
TK2a	State the different systems or equipment used in the organisation		
Distinction			
TK1b	<i>Describe how correct choice of direct interaction or the use of technology can be of benefit to the business</i>		
TK2b	<i>Provide an explanation of how systems can add value to the business</i>		
Knowledge and understanding of legislative responsibilities relating to the business, products and/or services being sold			
LS1a	Explain how the relevant legislation and regulations impact upon the organisation's customer service provision		
LS2a	Explain how the relevant legislation and regulations affect the day to day running of the business and ensure that business is not disrupted		
LS3a	Show or explain what action is required when a breach of Health and Safety regulations is observed		
Distinction			
LS1b	<i>Provide ideas to improve health, safety and security knowledge practices in the business</i>		
LS2b	<i>Provide examples of active involvement in maintaining safety and security of people and ensure resolution of identified risks</i>		
LS3b	<i>Show or explain what proactive steps could be taken to reduce risks before they become breaches of Health and Safety Regulations</i>		
Knowledge and understanding of how personal responsibilities and performance contribute to the success of the team and the business			
PK1a	State how personal behaviour and actions can have an impact on the team		
PS2a	Take a systematic approach to problem solving, know their own limits and when best to escalate issues		
PS3a	Know what they need to do in their role and complete all tasks to agreed timescales and standards		

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PS4a	Is punctual and routinely meets deadlines		
PS5a	Independently and regularly reflect on progress and set goals and priorities for future development		
Distinction			
PK1b	<i>Describe how having a positive attitude can impact the team you work with and how this can improve overall team performance</i>		
PS2b	<i>Demonstrate ability to actively address unexpected situations and complaints to achieve positive outcomes</i>		
PS3b	<i>Contribute to the success of the organisation through high-levels of performance, applying positive personal attributes, using initiative and sharing ideas</i>		
PS4b	<i>Prioritise future tasks and react to unexpected situations positively</i>		
PS5b	<i>Demonstrate a passion for the industry and sector and proactively explore learning, development and career progression</i>		

Apprentice Declaration

I confirm that the evidence contained within this portfolio is all my own work and any assistance given and/or sources used have been acknowledged.

Apprentice signature:	Date:
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Please ensure this Portfolio Matrix Sheet is submitted with your portfolio and that all evidence submitted is saved in one of the following file formats:

<i>.docx</i>	<i>.xlsx</i>	<i>.pptx</i>
<i>.pdf</i>	<i>.jpg</i>	<i>.png</i>
<i>.mp3</i>	<i>.mp4</i>	<i>.m4a</i>