

# Highfield Level 2 End-Point Assessment for Trade Supplier

## End-Point Assessment Kit



# Highfield Level 2 End-Point Assessment for Trade Supplier

EPA-Kit

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# How to Use this EPA Kit

Welcome to the Highfield End-Point Assessment Kit for the Trade Supplier Apprenticeship Standard.

Highfield is an independent end-point assessment organisation that has been approved to offer and carry out the independent end-point assessments for the Level 2 Trade Supplier Apprenticeship Standard. Highfield internally quality assures all end-point assessments in accordance with its IQA process, and additionally, all end-point assessments are externally quality assured by the relevant EQA organisation.

The EPA kit is designed to outline all you need to know about the end-point assessments for this standard and will also provide an overview of the on-programme delivery requirements. In addition, advice and guidance for trainers on how to prepare apprentices for the end-point assessment is included. The approaches suggested are not the only way in which an apprentice may be prepared for their assessments, but trainers may find them helpful as a starting point.

## Key facts

<b>Apprenticeship standard:</b>	Trade Supplier
<b>Level:</b>	2
<b>On Programme Duration:</b>	Minimum of 12 months
<b>End-Point Assessment Window:</b>	3 months
<b>Grading:</b>	Pass/merit/distinction
<b>End-Point Assessment methods:</b>	Knowledge test Real-life practical observation Professional discussion (supported by the portfolio of evidence)

**In this kit, you will find:**

- an overview of the standard and any on-programme requirements
- a section focused on delivery, where the standard and assessment criteria are presented in a suggested format that is suitable for delivery
- guidance on how to prepare the apprentice for gateway
- detailed information on which part of the standard is assessed by which assessment method
- suggestions on how to prepare the apprentice for each part of the end-point assessment
- a section focused on the end-point assessment method where the assessment criteria are presented in a format suitable for carrying out 'mock' assessments

# Introduction

## Standard overview

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Trade suppliers play a vital role in ensuring an efficient flow of goods and services between manufacturers and their skilled trade customer base. They operate in a variety of sectors including electrical, plumbing, joinery and general building supplies.

Typically, a trade supplier will operate in a small warehouse and trade counter, which is visited regularly by professional trade customers who have technical knowledge about what they are buying.

Trade suppliers can specialise in roles in a trade business environment, which may include sales, purchasing, account management, logistics and administration.

## On-programme requirements

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Although learning, development and on-programme assessment are flexible, and the process is not prescribed, the following is the recommended baseline expectation for an apprentice to achieve full competence in line with the Trade Supplier Apprenticeship Standard.

The on-programme assessment approach will be agreed between the training provider and employer. The assessment will give an ongoing indication of an apprentice's performance against the final outcomes defined in the standard. The training provider will need to prepare the apprentice for the end-point assessment, including preparation for the professional discussion and observation as well as collation of the portfolio of evidence (e.g. provision of recordings of professional discussions or workplace evidence).

The training programme leading to end-point assessment should cover the breadth and depth of the standard using suggested on-programme assessment methods that integrate the knowledge, skills and behaviour components, and that ensure that the apprentice is sufficiently prepared to undertake the end-point assessment.

It is recommended, but not required, that the on-programme assessment includes:

- regular performance reviews undertaken by the employer
- logbooks of work completed
- statements from customers, colleagues and managers

\*It is recommended that where possible the evidence collected makes use of video or audio technologies.

Throughout the period of learning and development, and at least every 3 months, the apprentice should meet with the on-programme assessor to record their progress against the standard. At these reviews, evidence should be discussed and recorded by the apprentice. The maintenance of an on-programme record is important to support the apprentice, on-programme assessor and employer in monitoring the progress of learning and development and to determine when the apprentice has achieved full competence in their job role and is therefore ready for end-point assessment.

## Readiness for end-point assessment

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In order for an apprentice to be ready for the end-point assessments:

- the apprentice must have achieved level 1 English and maths.
- the apprentice must have gathered a portfolio of evidence against the required standards to be put forward as a component of the end-point assessment.
- the line manager (employer) must be confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard and that the apprentice is competent in performing their role. To ensure this, the apprentice must attend a formal meeting with their employer to complete the gateway readiness report.
- the apprentice and the employer should then engage with Highfield to agree a plan and schedule for each assessment activity to ensure all components can be completed within a 3-month end-assessment window. Further information about the gateway process is covered later in this kit.

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# The Highfield Approach

This section describes the approach Highfield has adopted in the development of this end-point assessment in terms of its interpretation of the requirements of the end-point assessment plan and other relevant documents.

## Documents used in developing this end-point assessment

Standard (2018)

<https://www.instituteforapprenticeships.org/apprenticeship-standards/trade-supplier-v1-0>

End-point assessment plan (2018 ST 0334/AP03)

[https://www.instituteforapprenticeships.org/media/2875/st0334\\_trade-supplier\\_level-2\\_ap-for-publication\\_error-amend\\_01042019.pdf](https://www.instituteforapprenticeships.org/media/2875/st0334_trade-supplier_level-2_ap-for-publication_error-amend_01042019.pdf)

## Specific considerations

The following considerations have all been agreed with Ofqual, the external quality assurance (EQA) body for this standard.

Most of the evidence criteria used within the end-point assessment have been taken directly from the Trade Supplier Apprenticeship standard, however, criteria LK1a and LK1b have been written by Highfield as they were not provided in the standard.

There are a number of carry-over assessment criteria between assessment methods, which are detailed within this document.

Each criterion carries a possible total of 2 marks, with 1 mark being awarded for a pass and 1 mark being awarded for a distinction.

IfATE have introduced the flexibility framework which removes the need to complete assessments in a certain order if stated in the assessment plan. Therefore, Highfield have removed the need to complete and pass the knowledge test within this standard. This means that assessment methods can be taken at any point in the assessment window, and a Pass grade is not required in order to complete the remaining assessment methods.

With regards to the marking of a fail/pass for the workplace activities, it has been agreed that the fail marking range is 0-49 with the pass, therefore, being 50-65.

Criteria that are included in both the knowledge test and either the real-life practical observation or the professional discussion, must be assessed in both methods.

The grading descriptors provided on pages 7-8 and 10-11 will be used by assessors to inform overall decisions on competence, however, annexe 1 will be used as the primary assessment grading tool.

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# Gateway

## How to prepare for gateway

After apprentices have completed their on-programme learning, they should be ready to pass through 'gateway' to their end-point assessment.

Gateway is a meeting that should be arranged between the apprentice, their employer and training provider to determine that the apprentice is ready to undertake their end-point assessment. The apprentice should prepare for this meeting by bringing along work-based evidence, including:

- customer feedback
- recordings
- manager statements
- witness statements

As well as evidence from others, such as:

- mid and end-of-year performance reviews
- feedback to show how they have met the apprenticeship standards while on-programme

In advance of gateway, apprentices will need to have:

- achieved level 1 English
- achieved level 1 maths

Therefore, apprentices should be advised by employers and providers to gather this evidence and undertake these qualifications during their on-programme training. It is recommended that employers and providers complete regular checks and reviews of this evidence to ensure the apprentice is progressing and achieving the standards before the formal gateway meeting is arranged.

## The gateway meeting

The gateway meeting should last around an hour and must be completed on or after the apprenticeship on-programme end date. It should be attended by the apprentice and the relevant people who have worked with the apprentice on-programme, such as the line manager/employer or mentor, the on-programme trainer/training provider and/or a senior manager (as appropriate to the business).

During the meeting, the apprentice, employer and training provider will discuss the apprentice's progress to date and confirm if the apprentice has met the full criteria of the apprenticeship standard during their on-programme training. The **Gateway Readiness Report** should be used to log the outcomes of the meeting and agreed by all 3 parties. This report is available to download from the Highfield Assessment website.

The report should then be submitted to Highfield to initiate the end-point assessment process. If you require any support completing the Gateway Readiness Report, please contact your Employer Engagement Manager at Highfield Assessment.

**Please note:** a copy of the standard should be available to all attendees during the gateway meeting.

### Reasonable adjustments and special considerations

Highfield Assessment has measures in place for apprentices who require additional support. Please refer to the Highfield Assessment Reasonable Adjustments Policy for further information/guidance.

### ID requirements

Highfield Assessment will need to ensure that the person undertaking an assessment is indeed the person they are claiming to be. All employers are therefore required to ensure that each apprentice has their identification with them on the day of the assessment so the end-point assessor can check.

Highfield Assessment will accept the following as proof of an apprentice's identity:

- a valid passport (any nationality)
- a signed UK photocard driving licence
- a valid warrant card issued by HM forces or the police
- another photographic ID card, e.g. employee ID card, travel card, etc.

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# The Trade Supplier Apprenticeship Standard

The following pages contain the trade supplier apprenticeship standard and the assessment criteria in a format that is suitable for delivery.

Knowledge and understanding of the organisation	
Knowledge (OK)	Skills (OS)
<ul style="list-style-type: none"> <li>• Structure, mission, objectives and culture and how the role contributes to its success</li> <li>• Position in the flow of goods and services, between the manufacturer and the customer</li> <li>• Position in the external market and the wider sector within which the business operates, including the roles available in relation to their own career aspirations.</li> <li>• Internal policies and procedures, how these relate to the role and interact with legislative obligations</li> <li>• Vulnerability to situations that pose risk to the brand and/or business reputation.</li> </ul>	<ul style="list-style-type: none"> <li>• Communicating confidently to internal and external customers about the company and how it operates.</li> <li>• Identifying and communicating with the relevant person if a threat or risk to the business is identified.</li> </ul>
Knowledge Test	
Pass criteria	Distinction criteria
<p>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</p> <p>OK2a Explain the organisation’s <b>process</b> to provide customers with products obtained from manufacturers</p> <p>OK3a Describe the opportunities available in the organisation to gain and maintain knowledge about the products/service offer to customers</p> <p>OK4a Give examples of how relevant <b>legislation</b> and <b>regulations</b> affect the organisation, and how they are maintained through the organisation’s internal policies</p>	<p>OK1b <i>Share ideas of how their role can improve success of their organisation</i></p> <p>OK2b <i>Describe the <b>process</b> for obtaining goods for a customer which are <b>not stocked items</b></i></p> <p>OK3b <i>Proactively seek to further specialist product knowledge to improve customer experience and business performance</i></p> <p>OK4b <i>Explain the potential <b>impact</b> on the organisation if it fails to adhere to relevant <b>legislation and regulations</b></i></p> <p>OK5b <i>Explain how to identify any potential <b>risks</b> to the brand and business reputation and propose possible solutions</i></p>

OK5a State their responsibilities for keeping brand and business reputation safe from risk	
<b>Professional Discussion</b>	
<b>Pass criteria</b>	<b>Distinction criteria</b>
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	OK1b <i>Share ideas of how their role can improve success of their organisation</i>
OK2a Explain the organisation’s <b>process</b> to provide customers with products obtained from manufacturers	OK2b <i>Describe the <b>process</b> for obtaining goods for a customer which are <b>not stocked items</b></i>
OK3a Describe the opportunities available in the organisation to gain and maintain knowledge about the products/service offer to customers	OK3b <i>Proactively seek to further specialist product knowledge to improve customer experience and business performance</i>
OK4a Give examples of how relevant <b>legislation</b> and <b>regulations</b> affect the organisation, and how they are maintained through the organisation’s internal policies	OK4b <i>Explain the potential <b>impact</b> on the organisation if it fails to adhere to relevant <b>legislation and regulations</b></i>
OK5a State their responsibilities for keeping brand and business reputation safe from risk	OK5b <i>Explain how to identify any potential <b>risks</b> to the brand and business reputation and propose possible solutions</i>
OS1a Explain the organisation’s service offer to internal and external customers and how the organisation operates in line with its standards	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>
OS2a Explain who should be notified in a situation that poses a risk to the organisation	OS2b <i>Actively monitor situations that pose a potential risk and take responsibility to ensure these are resolved</i>
<b>Amplification and Guidance</b>	
<ul style="list-style-type: none"> <li>• <b>Process</b> <ul style="list-style-type: none"> <li>○ Understand the customer’s direct needs – gain as much information as possible to understand that you can source the best product for the customer. This could involve research into the customers’ business and industry allowing you to understand the needs of their business and provide the best service and results when supplying them with goods.</li> <li>○ Building good relationships with suppliers – sourcing the latest products ensuring variety for consumers. Understand the market changes. Build good product knowledge and keep into the market changes that may occur with new products being developed.</li> <li>○ Sourcing items for good rates – gain a variety of rates that are competitive, negotiate with suppliers based on quantity ordered, etc.</li> </ul> </li> </ul>	

- Confirming delivery times of goods – make sure that the items can be delivered within the timeframe needed for consumer requirements and confirm a process if this was delayed. Communicate with suppliers along the process to identify any issues that may arise and relay these to the customer as required to avoid an impact on their requirements.
- Offering alternative products when applicable – rather than not fulfilling an order try to offer an alternative and give the customer options to ensure their confidence in your supply. Understand the need of the customer to supply the best alternative product and requirements.
- **Stocked items**
  - Checking of stock condition making sure items are still in saleable form – this includes no damage, have not expired if they are perishable, have correct and up to date datasheets.
  - Regular checks to confirm stock levels are correct across the system – complete stock checks to confirm items stored are correct and ready for sale and correspond this with any systems used.
  - Using correct storage facilities. Comply to health and safety, COSHH requirements. – store items as manufacturers advise. If storing COSHH items use correct approved storage setups for individual product needs and regulations.
- **Non-stocked items**
  - Source good products which comply with regulations – ensure all products are compliant and can be sold within your tolerances and adhere to your policies. If this is sold direct to the customer, then make sure that they have all the regulations and understanding of the rules for the product supply.
  - Gain information from supplier before ordering on the specification of the products. Spec sheets, etc. – Gain product knowledge on the items provided and understand specific needs and requirements of the supply of these goods. Check paperwork requirements and health and safety implications when enquiring.
  - Understand the delivery process for unusual items, large items and items that are a controlled substance. Check with your customer that they have the facilities to offload, store and use the items safely. Offer advice based on your knowledge of product and ask the customer to provide evidence of their competence.
- **Legislation/Regulation**
  - **Supply of Goods and Services Act 1982.** An Act to amend the law with respect to the terms to be implied in certain contracts for the transfer of the property in goods, in certain contracts for the hire of goods and in certain contracts for the supply of a service; and for connected purposes.

- **Trade Descriptions Act 1968.** - An Act to replace the Merchandise Marks Acts 1887 to 1953 by fresh provisions prohibiting misdescriptions of goods, services, accommodation and facilities provided in the course of trade; to prohibit false or misleading indications as to the price of goods; to confer power to require information on instructions relating to goods to be marked on or to accompany the goods or to be included in advertisements; to prohibit the unauthorised use of devices or emblems signifying royal awards; to enable the Parliament of Northern Ireland to make laws relating to merchandise marks, and for purposes connected with those matters.
- **Consumer Rights Act 2015.** - sets out your rights when you're buying products, services and digital content.
- **Value Added Tax Act 1994.** - (c 23) is a UK tax law, concerning taxation of goods and services that fall within the scope of Value Added Tax (VAT).
- **Customs and Excise Management Act 1979.** - s139 and Schedule 3 to that Act. sets out the provisions to allow goods to be seized and detained. It also sets out the circumstances where the power can be exercised by others, including police officers and the coastguard.
- **Impact**
  - Trade tariffs implemented for goods imported. 3 codes – Code “S”, Code “Z” and Code “A” – Comply with all paperwork required and understand the timescale needed for the import and export process to avoid a delay in your delivery schedule. This is a changing process and needs to be regularly updated to comply.
  - Coronavirus – delays in delivery/production of items due to virus shutdowns. Border closures impacting on items received and sent. Make sure that the impact is relayed to the customer explaining the implications and any delays possible. Comply to all Government guidance that is updated.
  - Brexit – longer processes and increased paperwork to import items and trade with the EU. Understanding the new process, delays and implications. Conforming to all regulations and composing paperwork that is applicable to supplier of goods.
- **Risks**
  - Trade wars and economic changes – trade agreements not met between countries, increasing of tariffs.
  - Supply shortages – specific items increase in demand and suppliers cannot supply as required
  - National disasters and climate change – Coronavirus, earthquakes, floods, low water levels for shipping requirements.
  - Poor quality control – product recalls, insufficient quality on parts, loss of customers.

## Knowledge and understanding of the specialist trade customer profile of the business

Knowledge (CK)	Skills (CS)
<ul style="list-style-type: none"> <li>• Identify specialist customer needs.</li> <li>• Recognise how to be an effective listener</li> <li>• Recognise the difference between internal and external customers and the relationship between customer satisfaction and organisational performance</li> </ul>	<ul style="list-style-type: none"> <li>• Using appropriate techniques and forms of communication to put customers at ease and gain their trust.</li> <li>• Delivering customer service that exceeds customer expectations.</li> <li>• Identifying customer requirements and referring them onwards in an appropriate manner.</li> </ul>
Knowledge Test	
Pass criteria	Distinction criteria
CK1a Offer the appropriate product or service options to meet the identified needs of the customers CK2a Display active listening skills CK3a Explain the difference between internal and external customers in the context of their organisation	<i>CK1b Demonstrate the ability to offer alternative, additional or complementary products or services to meet the identified needs of customers</i> <i>CK2b Demonstrate the use of active listening to build and help formulate ideas to generate solutions</i> <i>CK3b Explain the difference in the way internal and external customer relationships are managed</i>
Practical Observation	
Pass criteria	Distinction criteria
CK1a Offer the appropriate product or service options to meet the identified needs of the customers CK2a Display active listening skills	<i>CK1b Demonstrate the ability to offer alternative, additional or complementary products or services to meet the identified needs of customers</i> <i>CK2b Demonstrate the use of active listening to build and help formulate ideas to generate solutions</i>

<p>CS1a Demonstrate <b>adaptability</b> in the service approach to meet the needs of customers and build their trust</p> <p>CS2a Supply a service/product range to the customer that is not normally available</p> <p>CS3a Offer appropriate product and/or service options to meet the identified needs of customers and communicate to customers how the proposed offer meets their needs.</p>	<p>CS1b <i>Use initiative to improve sales and/or improve customer service by use of specialist customer knowledge</i></p> <p>CS2b <i>Exceed customer expectations in the presentation of solutions that include a range of products and services, the relevant <b>merits</b> of each, alternatives and complementary products and services available</i></p> <p>CS3b <i>Have an in-depth understanding of the different specialist trade <b>customer profiles</b> that will exceed customer expectations in the presentation of solutions, alternatives and complementary products and services</i></p>
<b>Professional Discussion</b>	
<b>Pass criteria</b>	<b>Distinction criteria</b>
<p>CK3a Explain the difference between internal and external customers in the context of their organisation</p> <p>CS2a Supply a service/product range to the customer that is not normally available</p>	<p>CK3b <i>Explain the difference in the way internal and external customer relationships are managed</i></p> <p>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></p>
<b>Amplification and Guidance</b>	
<ul style="list-style-type: none"> <li>• <b>Adaptability</b> <ul style="list-style-type: none"> <li>○ Communication – Listen actively and ask for feedback, pay attention to non-verbal cues, encourage others to ask relevant questions. Understand company policies and communicate these to customers as required. Engage with customers and suppliers to create the correct process allowing all parties to satisfy requirements. Communication in many forms will be translated and paying attention to what is required helps to deliver the end goal with minimal disruption.</li> <li>○ Problem solving – Face new challenges and gain confidence in something new to the workload. Seek advice and use the communication with your suppliers to resolve any queries and issues you may have. Communicate any information with your</li> </ul> </li> </ul>	

customer allowing them to understand the process and reassure them you are doing all you can to resolve the issue. Be flexible where possible and allow your network to support you in reaching your end goal.

- Be organised – be prepared for any sudden changes and communication errors that may occur by being clear and confirming the requirements of your customer. Make sure all relevant information is transmitted and correct to all parties. Complete tasks in order of importance and follow up any queries in writing when unsure. If your workload is high, then source support from colleagues making sure the process is efficient and correct.
- Do not be afraid to take risks – Challenge your comfort zone and adapt your skills to provide a better service. Taking risks stretches your ability to adapt and resolve issues in ways that may not occur on a daily basis but as long as you have the evidence to prove your risk then adapting to the new situation could prove effective.
- Relationships – maintain good relationships and communication with both internal and external customers. Use the support of internal customers where possible to maintain relationships with external customers where required. Understand the different needs of both internal and external customers and be confident that you are providing the same level of service to both parties.

- **Customer profiles**

- Customer profiles are built around the knowledge of the customer. They can be specific to each customer and need to be established to understand the best way to offer the customer a good experience. A single person's customer profile may be different from a large company and being able to identify this will help you to build individual profiles to provide a better service.
- Establish contacts – Establishing contacts means you can build a better relationship with a designated person within the organisation that understand the needs of the products ordered. This could be a buyer, contracts manager, office manager, etc. Establish a backup contact if your 1<sup>st</sup> contact is not available and maintain a relationship with this contact to keep the supply of goods relevant.
- Relevant Marketing – knowing your customers allows you to market the specific products they need and offer them a personal solution for their market needs. Do not offer products to a customer that are not applicable as this may result in a lack of confidence from the customer in your ability to understand their personal and business needs.
- Build customer loyalty – Continue to communicate with your customer even when they are not placing orders. Provide them with any relevant information that may appeal to their market of new products and services that would support their business needs.

- **Merits**

- Understand – Understand the end result the customer is envisaging and work with them to create the transaction efficiently and successfully.

- Problem Solving – Make sure all problems are dealt with quickly and efficiently to reduce the impact on the customer in a negative form. Communicate regularly and provide customer with solutions even if temporary to not damage customer relations.
- Information – Offer as much information as possible to customer when communicating allowing them to feel confident you know the products and services you are promoting. Advise them of any savings, discounts and alternatives that may save them money and time.
- Make an impact – Give the customer confidence and reassurance that they made the right choice in your business. This could lead to further business through referrals and good reviews.

## Knowledge and understanding of trade counter and telesales services and how to

Knowledge (SK)	Skills (SS)
<p>Recognise the products, services and language used by trade customers and the technical application of those products and services.</p>	<ul style="list-style-type: none"> <li>• Assisting customers in exploring product ranges and alternative and complementary products and services, based on the fundamental underpinning product knowledge.</li> <li>• Identifying the customers' requirements, matching them to the trade supplier's products and services.</li> <li>• Delivering accurate product information to enable the customer to make a decision on products and services and know how to access the detailed technical specification of a product when required.</li> <li>• Securing a trade sale using appropriate selling techniques, both face to face and on the telephone, and methods to complete the transaction.</li> <li>• Applying basic merchandising techniques used within the business.</li> <li>• Applying the key principles of selling in a trade supplier environment, using a variety of methods, which may include unique selling points, upselling, and link selling to secure and complete sales transactions.</li> <li>• Communicating with customers using various methods and systems appropriate to the situation.</li> </ul>

	<ul style="list-style-type: none"> <li>Applying the key principles of administration and working practices to accurately prepare, store, communicate and process businesses documentation.</li> <li>Processing information, to the key standards of data protection, security and intellectual property rights.</li> </ul>
Knowledge Test	
Pass criteria	Distinction criteria
SK1a Demonstrate how establishing the facts allows for a customer-focused experience and appropriate response	SK1b <i>Explain the difference between the features and benefits of products and/or services to the customer</i>
Practical Observation	
Pass criteria	Distinction criteria
SK1a Demonstrate how establishing the facts allows for a customer-focused experience and appropriate response	SK1b <i>Explain the difference between the features and benefits of products and/or services to the customer</i>
SS1a Demonstrate a knowledge of how to identify additional products/services the organisation has to offer	SS1b <i>Demonstrate product knowledge and understanding that is over and above what a customer can find for themselves</i>
SS2a Display good communication skills to identify customers' needs and reflect this in the offer to the customer	SS2b <i>Accurately describe the features and benefits of products and services to customers in a way that helps them make an informed decision</i>
SS3a Demonstrate good listening skills and make recommendations of suitable products and services available based on technical specification	SS3b <i>Demonstrate breadth of knowledge around product benefits, providing insight into usefulness of product specifications</i>
SS4a Demonstrate good negotiation skills. Show confidence when dealing with different customer and transaction types operating within limits of authority	SS4b <i>Demonstrate genuine rapport with customers and off script when engaging with them</i>
SS5a Display an understanding of the importance of clean and tidy <b>housekeeping</b>	SS5b <i>Demonstrate how to maximize the creative use of space throughout the display area</i>
SS6a Occasionally offer associated products to complement those requested by the customer	SS6b <i>Always use upselling and link selling techniques with all customers in order to secure, complete and increase sales transactions</i>

SS7a	React promptly to customers: arriving at the Trade Counter; upon receipt of an email; or in response to a ringing telephone.	SS7b	<i>React with enthusiasm and speed when communicating with customers: arriving at the Trade Counter; upon receipt of an email; or in response to a ringing telephone</i>
SS8a	Demonstrate an understanding of systems and procedures involving documentation as well as company policy on document and information retention	SS8b	<i>Provide ideas of how working practices could be improved, providing cost and time-saving efficiencies to the business</i>
Professional Discussion			
Pass criteria		Distinction criteria	
SS5a	Display an understanding of the importance of clean and tidy housekeeping	SS5b	<i>Demonstrate how to maximize the creative use of space throughout the display area</i>
SS6a	Occasionally offer associated products to complement those requested by the customer	SS6b	<i>Always use upselling and link selling techniques with all customers in order to secure, complete and increase sales transactions</i>
SS8a	Demonstrate an understanding of <b>systems and procedures</b> involving documentation as well as company policy on document and information retention	SS8b	<i>Provide ideas of how working practices could be improved, providing cost and time-saving efficiencies to the business</i>
SS9a	Demonstrate awareness of legislation and treat confidential information correctly in line with company policy	SS9b	<i>Use own initiative to protect confidential information and reassure customers of the procedures in place in line with company policy. Explain the <b>key standards and rights</b> regarding data protection and security</i>
Amplification and Guidance			
<ul style="list-style-type: none"> <li>• <b>Housekeeping</b> <ul style="list-style-type: none"> <li>○ Personal appearance – Present yourself positively, confidently and with good personal hygiene and a smart appearance. Wear uniform where applicable to promote a consistent image. Use correct PPE where applicable and apply safety procedures in customer-facing situations.</li> <li>○ Workspace – Keep your workspace tidy and organised to promote a good company image and confidence that you have a good environment to complete tasks successfully. Understand the company policy for GDPR and the Data Protection Act 2018 making sure all relevant information and documents are stored correctly and safely.</li> <li>○ Reaction – Deal with enquiries in a timely fashion as required by individual customers. Prioritise tasks due to their urgency and customer time requirements. Orders received in advance can be planned into your working programme and time allocated to complete when required. Customers coming into a trade counter will need to be dealt with quickly and efficiently without affecting</li> </ul> </li> </ul>			

the customer experience. Dealing with customers in a queue fashion allows each customer to know their needs will be met as quickly as possible.

- **Systems and procedures**

- Training – Accept all training provided on systems and procedures used within your role. Ask questions if unsure and make sure all processes are followed the same as guidance issued. Use the knowledge of more experienced colleagues if required as this will help to increase your knowledge and experience first-hand.

- **Key standards and rights**

- Company Policies and procedures – know the policies set out by the organisation and what is expected of yourself to adhere to these. Understand that policies and procedures go hand in hand but are not interchangeable.

- **Rights**

- Know your employment rights and learn to identify where these apply and what to do if these rights are not met. Understand the process to follow if your needs are not met and what support is on offer to help if required. Make yourself aware of the company handbook and any other documentation that explains your rights and responsibilities.

## Knowledge and understanding of the key principles of warehousing and stock control

Knowledge (WK)	Skills (WS)
<ul style="list-style-type: none"> <li>• The safe movement, storage and stock control of products within the trade supplier environment.</li> </ul>	<ul style="list-style-type: none"> <li>• Processing and recording the receipt, storage, assembly and despatch of goods.</li> <li>• Receiving stock, despatching customer orders and processing returns in line with company processes.</li> <li>• Loading/unloading of supplier and contractor vehicles.</li> </ul>
Knowledge Test	
Pass criteria	Distinction criteria

WK1a Describe company procedure and correct <b>Personal Protective Equipment (PPE)</b> requirements for the safe movement, storage and stock control of products	WK1b <i>Explain ways in which to improve the procedure and the extra steps taken to reduce any risks further</i>
<b>Practical Observation</b>	
<b>Pass criteria</b>	<b>Distinction criteria</b>
WK1a Describe company procedure and correct <b>Personal Protective Equipment (PPE)</b> requirements for the safe movement, storage and stock control of products	WK1b <i>Explain ways in which to improve the procedure and the extra steps taken to reduce any risks further</i>
WS1a Apply company procedure to the “goods-in” process. Complete all paperwork correctly and in a timely manner and report any issues to the line manager WS2a Always follow procedure and pass information on when something is wrong WS3a Follow company procedure and <b>Health and Safety Regulations</b> in the loading and unloading of supplier and customer vehicles	WS1b <i>Use own initiative to resolve any issues in line with procedure, professionally communicating with suppliers, colleagues and drivers</i> WS2b <i>Use own initiative to resolve any issues in line with procedure, professionally communicating with relevant parties</i> WS3b <i>Demonstrate own initiative when dealing with suppliers and exercises extreme care and caution when loading and unloading whilst liaising with the driver</i>
<b>Amplification and Guidance</b>	
<ul style="list-style-type: none"> <li>• <b>Personal Protective Equipment (PPE)</b> <ul style="list-style-type: none"> <li>○ Be aware of what PPE is required in different areas of the work environment. Adhere to any rules set out by your employer and comply with requests for increased PPE if required in extreme situations.</li> </ul> </li> <li>• <b>Goods-in</b> <ul style="list-style-type: none"> <li>○ Familiarise yourself with the procedure for goods in and complete tasks within time scales applicable. Make sure documentation is correct before accepting any goods and any discrepancies are dealt with immediately to reduce the delay of incorrect products being accepted. Complete any risk assessments required to ensure accidents and injuries can be avoided.</li> </ul> </li> <li>• <b>Health and Safety Regulations</b></li> </ul>	

- Health and Safety at Work Etc. Act 1974 - Businesses are required to have good and working health and safety management in place. They should be competent in their workplace risk assessment and with required first aid. Properly documented information regarding health and safety at work.
- **The Management of Health and Safety at Work Regulations 1999** - They explicitly outline what employers are required to do to manage health and safety and apply to every work activity. The regulations place a set of duties on employers and employees to maintain a safe and healthy workplace.
- **Personal Protective Equipment at Work Regulations 1992** - The regulations place a duty on every employer to ensure that suitable personal protective equipment is provided to employees who may be exposed to a risk to their health or safety while at work.
- **The Manual Handling Operations Regulations 1992** - were created as rules for businesses to follow when it comes to the risks that can be involved when manual handling occurs, this is so there is a straightforward, standardised way of managing risks in the workplace.
- **Provision and Use of Work Equipment Regulations (PUWER) 1998** - The regulations deal with the work equipment and machinery used every day in workplaces and aims to keep people safe wherever equipment and machinery are used at work.

## Knowledge and understanding of the technologies that are appropriate to the role

Knowledge (TK)	Skills (TS)
<ul style="list-style-type: none"> <li>• Benefits and potential limitations of technology in the workplace.</li> <li>• Different technologies and how they support the operation of the business.</li> </ul>	<ul style="list-style-type: none"> <li>• Using technology appropriately and efficiently in line with business policy, e.g. Point of Sale Machines, PCs.</li> <li>• Demonstrating the use of various technologies, e.g. bespoke/in house or off the shelf software packages to others</li> </ul>
Knowledge Test	
Pass criteria	Distinction criteria
TK1a Describe benefits of the use of technology in <b>interactions</b> in the workplace and indicate instances when <b>direct</b> interaction is preferable	TK1b Describe how correct choice of direct interaction or the use of technology can be of benefit to the business
TK2a State the different systems or equipment used in the organisation	TK2b Provide an explanation of how systems can <b>add value</b> to the business

Practical Observation	
Pass criteria	Distinction criteria
TS1a Demonstrate basic use of the different systems, equipment or technology used in the organisation	<i>TS1b Demonstrate <b>fluency</b> of use of the different systems, equipment or technology used in the organisation</i>
TS2a Demonstrates basic knowledge of appropriate <b>software tools</b> used by the organisation	<i>TS2b Demonstrates advanced knowledge of appropriate <b>software tools</b> used by the organisation</i>
Professional Discussion	
Pass criteria	Distinction criteria
TK1a Describe benefits of the use of technology in <b>interactions</b> in the workplace and indicate instances when <b>direct</b> interaction is preferable	<i>TK1b Describe how correct choice of <b>direct interaction</b> or the use of technology can be of benefit to the business</i>
TK2a State the different systems or equipment used in the organisation	<i>TK2b Provide an explanation of how systems can <b>add value</b> to the business</i>
Amplification and Guidance	
<ul style="list-style-type: none"> <li>• <b>Interactions</b> <ul style="list-style-type: none"> <li>○ Use your interactions with your colleagues to advance on experience and knowledge as each person develops own skill set and the more you know about each other skill sets the more you can be confident to have a greater knowledge base. Engage with customers on a personal level using all forms of communication. Some examples: <ul style="list-style-type: none"> <li>– Email</li> <li>– Telephone calls</li> <li>– Face to Face</li> <li>– Trade shows</li> <li>– Marketing tools</li> <li>– Social Media</li> </ul> </li> </ul> </li> <li>• <b>Direct</b></li> </ul>	

- Make a point of contacting your customers regularly to engage the needs they may have but don't realise. Never assume just because a customer hasn't come to you that they might not need something you can supply. Don't hassle the customer just offer a catch-up call from time to time to see if there is anything you can offer.
- **Software tools**
  - The use of social media is a strong tool to update a lot of customers at once. Offering information on new products and promotions that might engage the customer expectantly. Having the correct functioning systems to support your business is important and understanding how to use them to your advantage. Adapting processes to save time and paperwork can be effective for both business and customers.
- **Add value**
  - Having a system that works for the running of your business can mean efficiency passed onto the customers. Systems that are specific to the industry and can be adapted to your specific business needs as these can change and adapt to suit the market you supply. Having a well-organised trade counter if applicable gives a good customer first impression and allows customers to have a more face to face good experience.
- **Fluency**
  - Make sure that your systems work for the business needs. Suggest adaptations and changes that could increase productivity and reduce time if efficient. Allowing adaptation means you can change to needs and requirements of each customer without compromising the overall standard expected. Listen to suggestions from your customer base as this may be the idea you didn't think of.

## Knowledge and understanding of legislative responsibilities relating to the business, products and/or services being sold

Knowledge (LK)	Skills (LS)
Importance of health, safety and security in a trade supplies environment, and the consequences of not following legal guidelines.	Complying with legal requirements to minimise risk and build customer confidence. Minimising disruption to the business and maintaining the safety and security of people at all times Taking appropriate action if a breach of H&S regulations is identified.

Knowledge Test	
Pass criteria	Distinction criteria
LK1a State <b>consequences</b> of not following legal guidelines in relation to health, safety and security	LK1b Explain ways to improve health, safety and security
Practical Observation	
Pass criteria	Distinction criteria
LS3a Show or explain what action is required when a <b>breach</b> of Health and Safety regulations is observed	<i>LS3b Show or explain what proactive steps could be taken to reduce risks before they become breaches of Health and Safety Regulations.</i>
Professional Discussion	
Pass criteria	Distinction criteria
LS1a Explain how the relevant <b>legislation and regulations</b> impact upon the organisation's customer service provision	<i>LS1b Provide ideas to improve health, safety and security knowledge practices in the business</i>
LS2a Explain how the relevant <b>legislation and regulations</b> affect the day to day running of the business and ensure that business is not disrupted	<i>LS2b Provide examples of active involvement in maintaining safety and security of people and ensure resolution of identified risks</i>
LS3a Show or explain what action is required when a <b>breach</b> of Health and Safety regulations is observed	<i>LS3b Show or explain what proactive steps could be taken to reduce risks before they become breaches of Health and Safety Regulations.</i>
Amplification and Guidance	
<ul style="list-style-type: none"> <li>• <b>Breach</b> – breaking or not following legislation or regulation</li> <li>• <b>Consequences:</b> <ul style="list-style-type: none"> <li>○ <b>Legal</b> – companies and employees that do not comply with legal obligations such as health and safety can be liable for prosecution by regulators such as the HSE. Deliberate malpractice can lead to fines and in some cases imprisonment.</li> <li>○ <b>Compensation Claims</b> – If a compensation claim is made you have a legal obligation to address the request. Try to resolve this amicably with the customer offering a solution that works for them first but also for the business.</li> <li>○ Increase in costs – A consequence of not complying with regulations has an impact on a company's ability to gain competitive insurance premiums.</li> </ul> </li> </ul>	

- **Productivity and Profitability** – Any incident that has occurred can affect productivity and profitability. Refresh yourself with the regulations to not breach any rules again and seek guidance if you are unsure. Provide continued service to customers with a clear knowledge of the required aspects of the business.
- **Reputational Damage** – Every bad review goes further than a good one. Restore confidence in yourself and promote this to customers. Take the opportunity to learn from mistakes made and identify further issues before they arise.
- **Legislation and regulations** –
  - **The Sale of Goods Act 1979** was introduced to offer greater protection to consumers and/or purchasers when they have entered into a contract for goods or services. When a contract is entered into between a buyer and a seller, guarantees come into being which relate to the suitability, quality and standard of the product being supplied.
  - **The Trade Descriptions Act 1968 made it an offence for businesses or salespeople to sell a product or service based on misinformation.** The Act forced them to be more truthful about their service or product and not deliberately mislead consumers into spending their money on a false claim. The law also gave the Courts the power to punish offending individuals or companies from making these false claims.

## Knowledge and understanding of how personal responsibilities and performance contribute to the success of the team and the business

Knowledge (PS)	Skills (PS)	Behaviours (PB)
<ul style="list-style-type: none"> <li>● Understand the impact of personal behaviour and actions on the team.</li> <li>● Recognise and comply with organisational standards of presentation and behaviour.</li> </ul>	<ul style="list-style-type: none"> <li>● Building two-way trust and contributing to working within a team</li> <li>● Collaborating with colleagues to resolve problems.</li> <li>● Managing personal performance by completing tasks to agreed standards and timescales and by taking action to resolve</li> </ul>	<ul style="list-style-type: none"> <li>● Adopts an approachable and friendly manner, interacting with customers in the style of the business.</li> <li>● Takes an active interest in the range of products and services offered by the business.</li> <li>● Works with integrity in an honest and trustworthy manner.</li> </ul>

	<p>problems and communicating issues beyond own level of competence.</p> <ul style="list-style-type: none"> <li>• Demonstrating effective time management through planning and prioritising own workload.</li> <li>• Identifying own strengths weaknesses and development needs.</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates adaptability and flexibility in own performance.</li> <li>• Shows an organised and committed approach, with a positive attitude</li> <li>• Takes ownership and responsibility for own performance, is diligent and accurate</li> <li>• Supports equality and diversity in the workplace.</li> <li>• Uses appropriate <b>Personal Protective Equipment</b> and operates machinery safely and effectively.</li> <li>• Consistently takes into account company environmental and sustainability policies and procedures</li> </ul>
Knowledge Test		
Pass criteria		Distinction criteria
PK1a State how personal behaviour and actions can have an impact on the team		<i>PK1b Describe how having a positive attitude can impact the team you work with and how this can improve overall team performance</i>
PK2a Follow business requirements of personal presentation (including <b>Personal Protective Equipment</b> )		<i>PK2b Explain the benefits of complying with organisational standards for presentation and behaviour and how this can impact customers' expectations</i>
Practical Observation		
Pass criteria		Distinction criteria
PK2a Follow business requirements of personal presentation (including <b>Personal Protective Equipment</b> )		<i>PK2b Explain the benefits of complying with organisational standards for presentation and behaviour and how this can impact customers' expectations</i>

<p>PS1a Carry out tasks with consideration for others. Seek help and support from others when appropriate</p> <p>PS2a Take a systematic approach to problem solving, know their own limits and when best to escalate issues</p> <p>PS3a Know what they need to do in their role and complete all tasks to agreed timescales and standards</p> <p>PB1a Demonstrate a range of <b>methods of communication</b>, usually adapting these to meet the needs of the customer</p> <p>PB4a Show flexibility to meet the needs of the organisation</p> <p>PB5a Be organised and committed with a positive attitude when carrying out the role</p> <p>PB6a Can be trusted to work on their own. Can take responsibility for their own mistakes</p> <p>PB8a Uses the correct personal protective equipment (PPE) for the <b>appropriate machinery</b> to operate it safely</p>	<p><i>PS1b Provide feedback to colleagues on performance and actively seek feedback in order to identify areas for improvement</i></p> <p><i>PS2b Demonstrate ability to actively address unexpected situations and complaints to achieve positive outcomes</i></p> <p><i>PS3b Contribute to the success of the organisation through high levels of performance, applying positive personal attributes, using initiative and sharing ideas</i></p> <p><i>PB1b Demonstrate a wide range of <b>methods of communication</b>, and adapt the method used (including language and type of communication) to build rapport and exceed the expectations of the customer</i></p> <p><i>PB4b Volunteer for additional tasks and responsibilities as required by the organisation. Can recommend different ways of working when appropriate</i></p> <p><i>PB5b Remain organised and committed with a positive attitude when under pressure</i></p> <p><i>PB6b Welcome feedback and actively seek to improve personal performance</i></p> <p><i>PB8b Can describe the importance of <b>PPE</b> and good housekeeping in the organisation. Is observant and vigilant and actively looks for ways to make the workplace safer</i></p>
<b>Professional Discussion</b>	
<b>Pass criteria</b>	<b>Distinction criteria</b>
<p>PK1a State how personal behaviour and actions can have an impact on the team</p>	<p><i>PK1b Describe how having a positive attitude can impact the team you work with and how this can improve overall team performance</i></p>

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

PS4a Is punctual and routinely meets deadlines

PS5a Independently and regularly reflect on progress and set goals and priorities for future development

PB2a Show awareness of the products and services offered by the business and know basic specifications and information

PB3a Work in a fair and honest manner, can be trusted to work with limited supervision

PB4a Show flexibility to meet the needs of the organisation

PB6a Can be trusted to work on their own. Can take responsibility for their own mistakes

PB7a Is aware of the company equality and diversity policies and processes and knows how they apply to them and others in the workplace

PB8a Uses the correct **personal protective equipment (PPE)** for the appropriate machinery to operate it safely

PB9a Can describe how to apply company environmental and sustainability policies and procedures

*PS2b Demonstrate ability to actively address unexpected situations and complaints to achieve positive outcomes*

*PS3b Contribute to the success of the organisation through high levels of performance, applying positive personal attributes, using initiative and sharing ideas*

*PS4b Prioritise future tasks and react to unexpected situations positively*

*PS5b Demonstrate a passion for the industry and sector and proactively explore learning, development and career progression*

*PB2b Use available systems and information to understand the range of services and products offered by the business to update own knowledge*

*PB3b Can be trusted to work with no supervisor and can demonstrate high levels of integrity and honesty. Understand how their behaviour reflects on the business*

*PB4b Volunteer for additional tasks and responsibilities as required by the organisation. Can recommend different ways of working when appropriate*

*PB6b Welcome feedback and actively seek to improve personal performance*

*PB7b Actively supports equality and diversity in the workplace by reporting issues and concerns when identified*

*PB8b Can describe the importance of **PPE** and good housekeeping in the organisation. Is observant and vigilant and actively looks for ways to make the workplace safer*

*PB9b Can explain how company environmental and sustainability policies have a positive impact on the wider environment*

**Amplification and Guidance**

- **Appropriate machinery**
  - Ensure any equipment or machinery complies to:
    - suitable for the intended use
    - safe for use, maintained in a safe condition and inspected to ensure it is correctly installed and does not subsequently deteriorate
    - used only by people who have received adequate information, instruction and training
    - accompanied by suitable health and safety measures, such as protective devices and controls. These will normally include guarding, emergency stop devices, adequate means of isolation from sources of energy, clearly visible markings and warning devices
    - used in accordance with specific requirements, for mobile work equipment and power presses
  
- **Methods of communication**
  - Written - Written Communication Definition: The Written Communication refers to the process of conveying a message through the written symbols. In other words, any message exchanged between two or more persons that make use of written words is called written communication.
  - Verbal - Speaking with clarity, being silent and focused, being well behaved, and following some of the general rules of behaviour altogether will help in the process of oral or verbal communication. The verbal part of communication refers to the words that we choose, and how they are heard and interpreted.
  - Body Language - Body language is a type of **nonverbal communication** in which physical behaviours, as opposed to words, are used to express or convey the information. Such behaviour includes facial expressions, body posture, gestures, eye movement, touch and the use of space.
  
- **Personal Protective Equipment (PPE)**
  - Be aware of what PPE is required in different areas of the work environment. Adhere to any rules set out by your employer and comply with requests for increased PPE if required in extreme situations.

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# Assessment Summary

The end-point assessment for the Trade Supplier Apprenticeship Standard is made up of 3 components.

1. Knowledge test consisting of 15 multiple-choice questions and 5 short-answer questions (SAQ) of 60-minute duration.
2. Real-life practical observation of 3-hour duration.
3. Professional discussion (supported by the portfolio of evidence), of approximately 60-minutes duration.

As an employer/training provider, you should agree a plan and schedule with the apprentice to ensure all assessment components can be completed effectively.

Each component of the end-point assessment will be assessed against the appropriate criteria laid out in this kit and a mark allocated. The grade will be determined using the combined mark.

## Knowledge test

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Total marks available are 30.

- To achieve a **pass**, apprentices will score at least 18 out of 30
- To achieve a **merit**, apprentices will score at least 23 out of 30
- To achieve a **distinction**, apprentices will score at least 26 out of 30
- **Unsuccessful** apprentices will have scored 17 or below

The test may be delivered online or be paper-based and should be in a 'controlled' environment.

The test must be passed before an apprentice can progress onto the workplace assessments.

## Workplace assessment - Real-life practical observation

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Marks from this section will be added to the marks awarded in the professional discussion to give the overall grade.

The real-life practical observation may be conducted using technology such as video link, as long as fair assessment conditions can be maintained.

## Workplace assessment - Professional discussion

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The professional discussion may be conducted using technology such as video link, as long as fair assessment conditions can be maintained.

All evidence provided in the portfolio must be mapped to the assessment criteria outlined within this document. A matrix sheet is provided on the Highfield Assessment website.

## Grading – workplace assessments

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The marks awarded for each assessment component are combined to calculate a final mark out of 100. This final mark will determine the overall grade, as per the table below:

Total mark achieved	Grade
49 or less	Fail
50 - 65	Pass
66 – 80	Merit
81+	Distinction

An apprentice cannot gain a mark for a distinction criteria if they have not gained the mark for the pass criteria.

## Overall grading

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The marks awarded for each assessment component are combined to calculate a final mark out of 100. This final mark will determine the overall grade, as per the table below:

Knowledge test	Workplace assessments (combined)	Overall grade
Pass	Pass	<b>Pass</b>
Minimum grade of pass	Merit	<b>Merit</b>
Minimum grade of merit	Distinction	<b>Distinction</b>

## Retake and Re-sit information

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Should an apprentice fail an assessment activity on the first attempt, a resit or retake is available for 1 further attempt on either the knowledge exam or the combined workplace assessments (observation and professional discussion). The apprentice, employer and provider will decide whether a resit or retake is appropriate.

If a retake is chosen for the knowledge exam, where further learning is required, this cannot be taken for at least 1 month following the release of the original result.

If an apprentice fails the knowledge test or the aggregated workplace assessment activities and completes a resit or a retake, the maximum grade for that component will be a pass.

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## Assessing the Knowledge Test

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The following knowledge areas of the Trade Supplier Apprenticeship Standard will be assessed by a 1-hour knowledge test consisting of 15 multiple-choice questions and 5 short-answer questions with a pass mark of 60% (18 out of 30).

The topics covered within the test are listed below.

- Knowledge and understanding of:
  - the organisation
  - specialist trade customer profile
  - trade counter and telesales services
  - the key principles of warehousing and stock control
  - technologies that are appropriate to the role
  - legislative responsibilities
  - how personal responsibilities and performance contribute to business success

In each paper, questions will cover each of the areas above, however, not every aspect of every area will be covered in every test.

### Before the assessment

The employer/training provider should:

- brief the apprentice on the areas that will be assessed by the knowledge test.
- in readiness for end-point assessment, set the apprentice a mock knowledge test. A test is available to download from the Highfield Assessment website. The mock tests are available as paper-based tests and also on the mock e-assessment system.

## Knowledge Test Criteria

Knowledge and understanding of the organisation	
Pass	Distinction
<b>Knowledge Test</b>	
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	<i>OK1b Share ideas of how their role can improve success of their organisation</i>
OK2a Explain the organisation's process to provide customers with products obtained from manufacturers	<i>OK2b Describe the process for obtaining goods for a customer which are not stocked items</i>
OK3a Describe the opportunities available in the organisation to gain and maintain knowledge about the products/service offer to customers	<i>OK3b Proactively seek to further specialist product knowledge to improve customer experience and business performance</i>
OK4a Give examples of how relevant legislation and regulations affect the organisation, and how they are maintained through the organisation's internal policies	<i>OK4b Explain the potential impact on the organisation if it fails to adhere to relevant legislation and regulations</i>
OK5a State their responsibilities for keeping brand and business reputation safe from risk	<i>OK5b Explain how to identify any potential risks to the brand and business reputation and propose possible solutions</i>

Knowledge and understanding of the specialist trade customer profile of the business	
Pass	Distinction
<b>Knowledge Test</b>	
CK1a Offer the appropriate product or service options to meet the identified needs of the customers	<i>CK1b Demonstrate the ability to offer alternative, additional or complementary products or services to meet the identified needs of customers</i>
CK2a Display active listening skills	<i>CK2b Demonstrate the use of active listening to build and help formulate ideas to generate solutions</i>
CK3a Explain the difference between internal and external customers in the context of their organisation	<i>CK3b Explain the difference in the way internal and external customer relationships are managed</i>

Knowledge and understanding of trade counter and telesales services	
Pass	Distinction
<b>Knowledge Test</b>	
SK1a Demonstrate how establishing the facts allows for a customer-focused experience and appropriate response	SK1b Explain the difference between the features and benefits of products and/or services to the customer

Knowledge and understanding of the key principles of warehousing and stock control	
Pass	Distinction
<b>Knowledge Test</b>	
WK1a Describe company procedure and correct Personal Protective Equipment (PPE) requirements for the safe movement, storage and stock control of products	WK1b Explain ways in which to improve the procedure and the extra steps taken to reduce any risks further

Knowledge and understanding of the technologies that are appropriate to the role	
Pass	Distinction
<b>Knowledge Test</b>	
TK1a Describe benefits of the use of technology in interactions in the workplace and indicate instances when direct interaction is preferable	TK1b Describe how correct choice of direct interaction or the use of technology can be of benefit to the business
TK2a State the different systems or equipment used in the organisation	TK2b Provide an explanation of how systems can add value to the business

Knowledge and understanding of legislative responsibilities relating to the business, products and/or services being sold	
Pass	Distinction
<b>Knowledge Test</b>	
LK1a State <b>consequences</b> of not following legal guidelines in relation to health, safety and security	LK1b Explain ways to improve health, safety and security

Knowledge and understanding of how personal responsibilities and performance contribute to the success of the team and the business	
Pass	Distinction
<b>Knowledge Test</b>	

## 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	PK1b	<i>Describe how having a positive attitude can impact the team you work with and how this can improve overall team performance</i>
PK2a	Follow business requirements of personal presentation (including Personal Protective Equipment)	PK2b	<i>Explain the benefits of complying with organisational standards for presentation and behaviour and how this can impact customers' expectations</i>

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## Assessing the real-life practical observation

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The assessment will take place in the apprentice's place of work and will last 3 hours. The apprentice will be expected to demonstrate to the assessor the knowledge, skills and behaviours of all elements of the trade supplier process.

Learners will be awarded with a mark based on their coverage of the assessment criteria.

The marks achieved by the apprentice for the real-life practical observation will be added to the marks achieved in the professional discussion to give a total out of 100 marks. This is to take into account that up to 10 elements of the workplace assessment may not occur in a real-life situation on the day of the observation and may have to be assessed by the professional discussion.

Highfield would encourage the employer/training provider and the apprentice to plan for the observation by familiarising themselves with the criteria that will be assessed and reflect on their experience in a trade supplier role.

### **Before the assessment:**

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which trade supplier 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 and identify real-life examples
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

### **Real-life Practical Observation Mock Assessment**

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It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that the apprentice experiences a mock practical observation in advance of the end-point assessment with the training provider/employer giving feedback on any areas for improvement.

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 suitable location.

- a 3-hour time slot should be available if it is intended to be a complete observation covering all relevant standards (outlined in the following pages). However, this time may be split up to allow for progressive learning.
- consider a video or audio recording and allow it to be available to other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate observation 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.

Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.

During the observation, the apprentice must carry out the following activities.

- Dealing with customers at the trade counter and over the telephone
  - Providing product information and offering alternatives where appropriate
  - Dealing with any issues
- Processing orders
  - Safe movement, storage and stock control of products
  - Wearing appropriate PPE
  - Dealing with issues inc. health and safety
- Taking delivery of goods
  - Following company procedures
  - Wearing appropriate PPE
- Basic administration related to these functions
  - Completing documentation or IT systems required of the role
- Collaboration with colleagues

## Real-life Practical Observation Criteria

Throughout the 3-hour observation, the assessor will review the apprentice's competence in the criteria outlined below and allocate the relevant marks. Pass criteria are worth 1 mark and distinction criteria are worth 2 marks.

Apprentices should prepare for the assessment by considering how the criteria can be met and reflecting on their past experiences.

Knowledge and understanding of the specialist trade customer profile of the business	
Pass	Distinction
<b>Practical Observation</b>	
CK1a Offer the appropriate product or service options to meet the identified needs of the customers CK2a Display active listening skills  CS1a Demonstrate adaptability in the service approach to meet the needs of customers and build their trust CS2a Supply a service/product range to the customer that is not normally available CS3a Offer appropriate product and/or service options to meet the identified needs of customers and communicate to customers how the proposed offer meets their needs.	CK1b <i>Demonstrate the ability to offer alternative, additional or complementary products or services to meet the identified needs of customers</i> CK2b <i>Demonstrate the use of active listening to build and help formulate ideas to generate solutions</i>  CS1b <i>Use initiative to improve sales and/or improve customer service by use of specialist customer knowledge</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> CS3b <i>Have an in-depth understanding of the different specialist trade customer profiles that will exceed customer expectations in the presentation of solutions, alternatives and complementary products and services</i>

Knowledge and understanding of trade counter and telesales services	
Pass	Distinction
<b>Practical Observation</b>	
SK1a Demonstrate how establishing the facts allows for a customer-focused experience and appropriate response	SK1b <i>Explain the difference between the features and benefits of products and/or services to the customer</i>

Knowledge and understanding of trade counter and telesales services	
SS1a Demonstrate a knowledge of how to identify additional products/services the organisation has to offer	SS1b <i>Demonstrate product knowledge and understanding that is over and above what a customer can find for themselves</i>
SS2a Display good communication skills to identify customers' needs and reflect this in the offer to the customer	SS2b <i>Accurately describe the features and benefits of products and services to customers in a way that helps them make an informed decision</i>
SS3a Demonstrate good listening skills and make recommendations of suitable products and services available based on technical specification	SS3b <i>Demonstrate breadth of knowledge around product benefits, providing insight into usefulness of product specifications</i>
SS4a Demonstrate good negotiation skills. Show confidence when dealing with different customer and transaction types operating within limits of authority	SS4b <i>Demonstrate genuine rapport with customers and off script when engaging with them</i>
SS5a Display an understanding of the importance of clean and tidy housekeeping	SS5b <i>Demonstrate how to maximize the creative use of space throughout the display area</i>
SS6a Occasionally offer associated products to complement those requested by the customer	SS6b <i>Always use upselling and link selling techniques with all customers in order to secure, complete and increase sales transactions</i>
SS7a React promptly to customers: arriving at the Trade Counter; upon receipt of an email; or in response to a ringing telephone.	SS7b <i>React with enthusiasm and speed when communicating with customers: arriving at the Trade Counter; upon receipt of an email; or in response to a ringing telephone</i>
SS8a Demonstrate an understanding of systems and procedures involving documentation as well as company policy on document and information retention	SS8b <i>Provide ideas of how working practices could be improved, providing cost and time-saving efficiencies to the business</i>

Knowledge and understanding of the key principles of warehousing and stock control	
Pass	Distinction
<b>Practical Observation</b>	
WK1a Describe company procedure and correct Personal Protective Equipment (PPE) requirements for the safe movement, storage and stock control of products	WK1b <i>Explain ways in which to improve the procedure and the extra steps taken to reduce any risks further</i>
WS1a Apply company procedure to the "goods-in" process. Complete all paperwork correctly and in a timely manner and report any issues to the line manager	WS1b <i>Use own initiative to resolve any issues in line with procedure, professionally communicating with suppliers, colleagues and drivers</i>

### Knowledge and understanding of the key principles of warehousing and stock control

WS2a Always follow procedure and pass information on when something is wrong	WS2b Use own initiative to resolve any issues in line with procedure, professionally communicating with relevant parties
WS3a Follow company procedure and Health and Safety Regulations in the loading and unloading of supplier and customer vehicles	WS3b Demonstrate own initiative when dealing with suppliers and exercises extreme care and caution when loading and unloading whilst liaising with the driver

### Knowledge and understanding of the technologies that are appropriate to the role

Pass	Distinction
<b>Practical Observation</b>	
TS1a Demonstrate basic use of the different systems, equipment or technology used in the organisation	TS1b Demonstrate fluency of use of the different systems, equipment or technology used in the organisation
TS2a Demonstrates basic knowledge of appropriate software tools used by the organisation	TS2b Demonstrates advanced knowledge of appropriate software tools used by the organisation

### Knowledge and understanding of legislative responsibilities relating to the business, products and/or services being sold

Pass	Distinction
<b>Practical Observation</b>	
LS3a Show or explain what action is required when a breach of Health and Safety regulations is observed	LS3b Show or explain what proactive steps could be taken to reduce risks before they become breaches of Health and Safety Regulations

### Knowledge and understanding of how personal responsibilities and performance contribute to the success of the team and the business

Pass	Distinction
<b>Practical Observation</b>	
PK2a Follow business requirements of personal presentation (including Personal Protective Equipment)	PK2b Explain the benefits of complying with organisational standards for presentation and behaviour and how this can impact on customers' expectations

## Knowledge and understanding of how personal responsibilities and performance contribute to the success of the team and the business

PS1a	Carry out tasks with consideration for others. Seek help and support from others when appropriate	PS1b	<i>Provide feedback to colleagues on performance and actively seek feedback in order to identify areas for improvement</i>
PS2a	Take a systematic approach to problem solving, know their own limits and when best to escalate issues	PS2b	<i>Demonstrate ability to actively address unexpected situations and complaints to achieve positive outcomes</i>
PS3a	Know what they need to do in their role and complete all tasks to agreed timescales and standards	PS3b	<i>Contribute to the success of the organisation through high levels of performance, applying positive personal attributes, using initiative and sharing ideas</i>

## Behaviours

Pass	Distinction
<b>Practical Observation</b>	
PB1a	Demonstrate a range of methods of communication, usually adapting these to meet the needs of the customer
PB1b	<i>Demonstrate a wide range of methods of communication and adapt the method used (including language and type of communication) to build rapport and exceed the expectations of the customer</i>
PB4a	Show flexibility to meet the needs of the organisation
PB4b	<i>Volunteer for additional tasks and responsibilities as required by the organisation. Can recommend different ways of working when appropriate</i>
PB5a	Be organised and committed with a positive attitude when carrying out the role
PB5b	<i>Remain organised and committed with a positive attitude when under pressure</i>
PB6a	Can be trusted to work on their own. Can take responsibility for their own mistakes
PB6b	<i>Welcome feedback and actively seek to improve personal performance</i>
PB8a	Uses the correct Personal Protective Equipment (PPE) for the appropriate machinery to operate it safely
PB8b	<i>Can describe the importance of PPE and good housekeeping in the organisation. Is observant and vigilant and actively looks for ways to make the workplace safer</i>

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## Assessing the Professional Discussion

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While on-programme, and after a minimum of 12 months on the apprenticeship, the apprentice will gather evidence to create a portfolio which will be the basis of the professional discussion. It will be verified by a person appointed by the employer or training provider organisation who has contact with the learner and has sector experience. The apprentice will submit their portfolio at gateway alongside the portfolio of evidence matrix.

You will be provided with a Dropbox link by your Highfield employer engagement manager to enable you to submit the apprentice's portfolio for the assessor to review to inform the professional discussion.

The assessor will review the portfolio, which will be used to inform questioning the professional discussion. The portfolio can be brought into the professional discussion.

The portfolio must contain at least 1 observation and 2 reflective accounts and can also contain other evidence of performance in the workplace, including performance review records, logbooks of work completed, statements from customers, colleagues and managers as well as discrete occupational tasks that relate to the elements set out in the standard.

The professional discussion is a semi-structured interview between the apprentice and the independent assessor, and it takes place once the assessor has had a chance to review the portfolio. It will focus on the knowledge, skills and behaviours in the standard and is expected to last 60 minutes.

The purpose of the professional discussion is to:

- explore evidence for areas of the standard that are best assessed verbally, due to the broad and complex nature of those areas, particularly the skills and behaviours
- provide the basis for the independent assessor to make a decision about the grade to be awarded for the workplace assessments

The independent assessor will select questions from a question bank developed by Highfield. These questions will be based on all areas of the standard and will allow assessors to ask probing follow-up questions, if required, to ensure the apprentice can meet both the pass and distinction criteria.

The professional discussion may be carried out face to face but could be done remotely using videoconference, depending on the number and location of apprentices.

The professional discussion will be conducted in a 'controlled environment' such as a quiet room away from the normal place of work. In all circumstances, the identity of the apprentice must be verified. The professional discussion has been chosen as an assessment method as verbal communication is a key component of the role. Apprentices will be able to demonstrate that they have met the requirements of the standard and will also be provided with the opportunity to work towards achieving a distinction.

### **Before the assessment:**

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which 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

## Professional Discussion Mock Assessment

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It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that the apprentice experiences a mock professional discussion in preparation for the real thing. The most appropriate form of mock professional discussion 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 professional discussion should take place in a suitable location.
- a 60-minute time slot should be available to complete the professional discussion if it is intended to be a complete professional discussion covering all relevant standards. However, this time may be split up to allow for progressive learning.
- consider a video or audio recording of the mock professional discussion and allow it to be available to 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. Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.
- ensure the apprentice uses at least 1 CPD activity they have undertaken.
- use structured 'open' questions that do not lead the apprentice but allows them to express their knowledge and experience in a calm and comfortable manner. For example:
  - What did you want to improve?
  - In what ways did you think improving this would help your performance in your role?
  - What did you do to improve your knowledge/skill in this area?
  - Were you successful in improving your performance longer term? Why?

## Professional Discussion Criteria

Throughout the 60-minute 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.

Knowledge and understanding of the organisation	
Pass	Distinction
<p>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</p> <p>OK2a Explain the organisation's <b>process</b> to provide customers with products obtained from manufacturers</p> <p>OK3a Describe the opportunities available in the organisation to gain and maintain knowledge about the products/service offer to customers</p> <p>OK4a Give examples of how relevant <b>legislation</b> and <b>regulations</b> affect the organisation, and how they are maintained through the organisation's internal policies</p> <p>OK5a State their responsibilities for keeping brand and business reputation safe from risk</p>	<p>OK1b <i>Share ideas of how their role can improve success of their organisation</i></p> <p>OK2b <i>Describe the <b>process</b> for obtaining goods for a customer which are not stocked items</i></p> <p>OK3b <i>Proactively seek to further specialist product knowledge to improve customer experience and business performance</i></p> <p>OK4b <i>Explain the potential <b>impact</b> on the organisation if it fails to adhere to relevant <b>legislation and regulations</b></i></p> <p>OK5b <i>Explain how to identify any potential <b>risks</b> to the brand and business reputation and propose possible solutions</i></p>
<p>OS1a Explain the organisation's service offer to internal and external customers and how the organisation operates in line with its standards</p> <p>OS2a Explain who should be notified in a situation that poses a risk to the organisation</p>	<p>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></p> <p>OS2b <i>Actively monitor situations that pose a potential risk and take responsibility to ensure these are resolved</i></p>

## Knowledge and understanding of the specialist trade customer profile of the business

Pass	Distinction
CK3a Explain the difference between internal and external customers in the context of their organisation	<i>CK3b Explain the difference in the way internal and external customer relationships are managed</i>
CS2a Supply a service/product range to the customer that is not normally available	<i>CS2b 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

Pass	Distinction
<b>Professional Discussion</b>	
SS5a Display an understanding of the importance of clean and tidy housekeeping	<i>SS5b Demonstrate how to maximize the creative use of space throughout the display area</i>
SS6a Occasionally offer associated products to complement those requested by the customer	<i>SS6b Always use upselling and link selling techniques with all customers in order to secure, complete and increase sales transactions</i>
SS8a Demonstrate an understanding of systems and procedures involving documentation as well as company policy on document and information retention	<i>SS8b Provide ideas of how working practices could be improved, providing cost and time-saving efficiencies to the business</i>
SS9a Demonstrate awareness of legislation and treat confidential information correctly in line with company policy	<i>SS9b 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

Pass	Distinction
<b>Professional Discussion</b>	
TK1a Describe benefits of the use of technology in <b>interactions</b> in the workplace and indicate instances when <b>direct</b> interaction is preferable	<i>TK1b Describe how correct choice of <b>direct interaction</b> or the use of technology can be of benefit to the business</i>
TK2a State the different systems or equipment used in the organisation	<i>TK2b Provide an explanation of how systems can <b>add value</b> to the business</i>

## Knowledge and understanding of legislative responsibilities relating to the business, products and/or services being sold

Pass	Distinction
<b>Professional Discussion</b>	
<p>LS1a Explain how the relevant <b>legislation and regulations</b> impact the organisation's customer service provision</p> <p>LS2a Explain how the relevant <b>legislation and regulations</b> affect the day to day running of the business and ensure that business is not disrupted</p> <p>LS3a Show or explain what action is required when a breach of Health and Safety regulations is observed</p>	<p><i>LS1b Provide ideas to improve health, safety and security knowledge practices in the business</i></p> <p><i>LS2b Provide examples of active involvement in maintaining safety and security of people and ensure resolution of identified risks</i></p> <p><i>LS3b Show or explain what proactive steps could be taken to reduce risks before they become breaches of Health and Safety Regulations</i></p>

## Knowledge and understanding of how personal responsibilities and performance contribute to the success of the team and the business

Pass	Distinction
<p>PK1a State how personal behaviour and actions can have an impact on the team</p> <p>PS2a Take a systematic approach to problem solving, know their own limits and when best to escalate issues</p> <p>PS3a Know what they need to do in their role and complete all tasks to agreed timescales and standards</p> <p>PS4a Is punctual and routinely meets deadlines</p> <p>PS5a Independently and regularly reflect on progress and set goals and priorities for future development</p>	<p><i>PK1b Describe how having a positive attitude can impact the team you work with and how this can improve overall team performance</i></p> <p><i>PS2b Demonstrate ability to actively address unexpected situations and complaints to achieve positive outcomes</i></p> <p><i>PS3b Contribute to the success of the organisation through high levels of performance, applying positive personal attributes, using initiative and sharing ideas</i></p> <p><i>PS4b Prioritise future tasks and react to unexpected situations positively</i></p> <p><i>PS5b Demonstrate a passion for the industry and sector and proactively explore learning, development and career progression</i></p>

## Behaviours

Pass	Distinction
<b>Professional Discussion</b>	
<p>PB2a Show awareness of the products and services offered by the business and</p>	<p><i>PB2b Use available systems and information to understand the range of services and</i></p>

## Behaviours

<p>know basic specifications and information</p> <p>PB3a Work in a fair and honest manner, can be trusted to work with limited supervision</p> <p>PB4a Show flexibility to meet the needs of the organisation</p> <p>PB6a Can be trusted to work on their own. Can take responsibility for their own mistakes</p> <p>PB7a Is aware of the company equality and diversity policies and processes and knows how they apply to them and others in the workplace</p> <p>PB8a Uses the correct personal protective equipment (PPE) for the appropriate machinery to operate it safely</p> <p>PB9a Can describe how to apply company environmental and sustainability policies and procedures</p>	<p><i>products offered by the business to update own knowledge</i></p> <p><i>PB3b Can be trusted to work with no supervision and can demonstrate high levels of integrity and honesty. Understand how their behaviour reflects on the business</i></p> <p><i>PB4b Volunteer for additional tasks and responsibilities as required by the organisation. Can recommend different ways of working when appropriate</i></p> <p><i>PB6b Welcome feedback and actively seek to improve personal performance</i></p> <p><i>PB7b Actively supports equality and diversity in the workplace by reporting issues and concerns when identified</i></p> <p><i>PB8b Can describe the importance of PPE and good housekeeping in the organisation. Is observant and vigilant and actively looks for ways to make the workplace safer</i></p> <p><i>PB9b Can explain how company environmental and sustainability policies have a positive impact on the wider environment</i></p>
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