

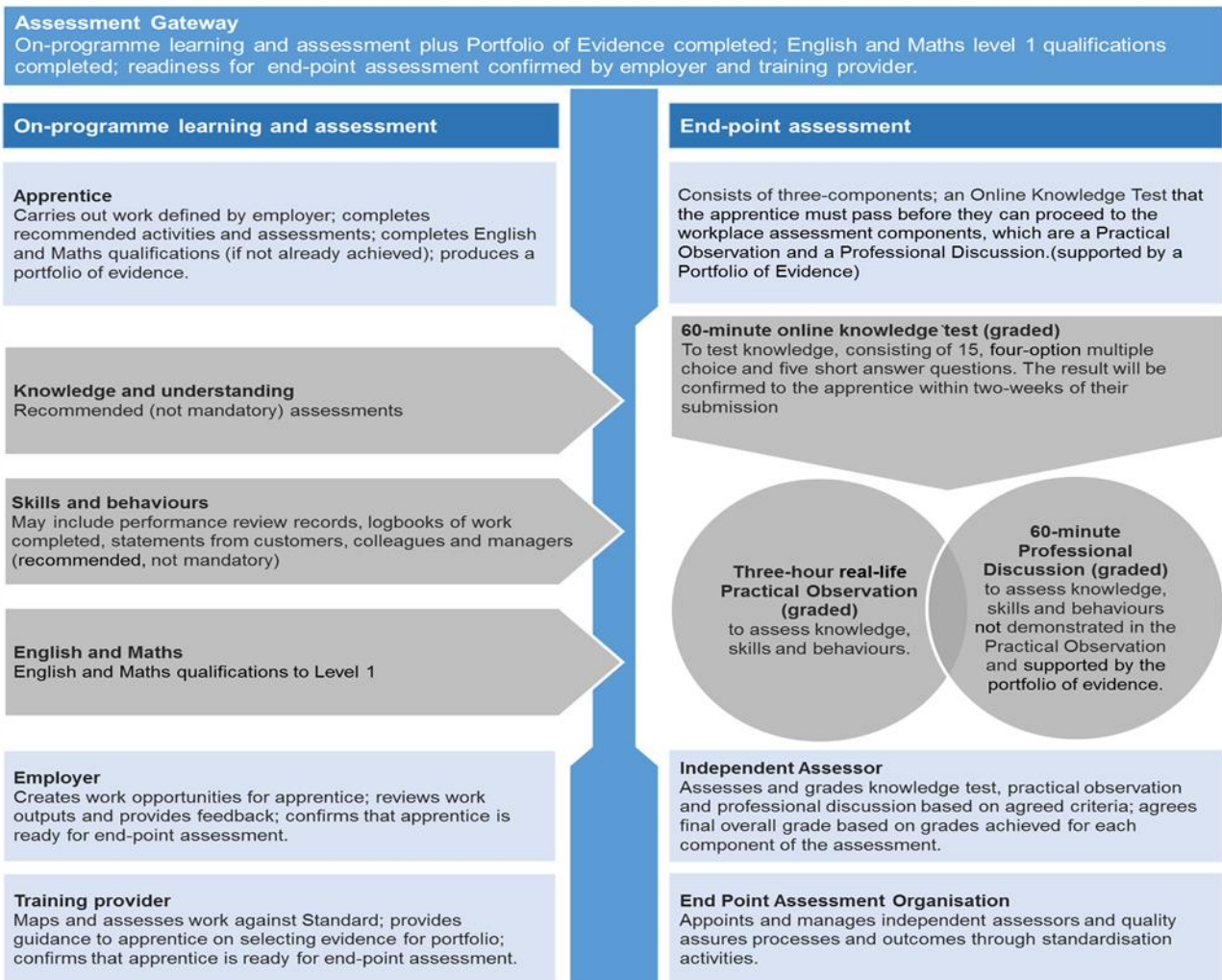
## Level 2 Trade Supplier Assessment Plan

### Summary of assessment

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.

This Assessment Plan is intended to ensure full competence in a cost-effective and efficient way taking evidence from the apprentice's day-to-day activities. The diagram below outlines the structure of the apprenticeship, the roles that the apprentice, employer, training provider and assessor/End-Point Assessment Organisation (EPAO) play in the success of the apprenticeship and an overview of how and when the end-point assessment takes place.



There are three components to the end-point assessment process: A knowledge test; a real-life Practical Observation; and a Professional Discussion (using the apprentice's Portfolio of Evidence to support the discussion). These will act as the end-point assessment to confirm full competence against the Level 2 Trade Supplier Apprenticeship Standard.

### Assessment Overview

This is a practical standard, underpinned by technical and product knowledge. It will allow the Trade Supplier Apprentice to develop the skills, knowledge and behaviours across different types of activities.

A summary of the assessment method used to assess competency in all elements of the standard can be found in Annex 1 End-Point Assessment (EPA) Method and Scoring Guide.

Assessment method	Area assessed	Assessed by	Grading
Knowledge test	Knowledge	Approved EPAO	Fail / Pass / Merit / Distinction
Real-Life Practical Observation	Knowledge, skills and behaviours	Approved EPAO	Fail / Pass / Merit / Distinction
Professional Discussion (supported by the Portfolio of Evidence)	Knowledge, skills and behaviours	Approved EPAO	Fail / Pass / Merit / Distinction

### On-programme assessment

It is recommended that the nominated training provider and apprentice will meet at least once every 4-weeks and a formal review of progress will be carried out every 12-weeks. This formal review will ascertain the apprentice's progress against the skills and knowledge requirements set out in the Apprenticeship Standard, as well as carrying out a formal review of the apprentice's demonstration of appropriate behaviours.

After a minimum of 12 months on the apprenticeship, the apprentice collates evidence for their portfolio to demonstrate they have met all of the competencies and elements set out in the Apprenticeship Standard.

The portfolio must contain evidence of direct observation in the workplace and reflective accounts, completed by the apprentice, which demonstrate their learning and application of knowledge in practice, their skills and behaviours.

The portfolio will be used to inform the Professional Discussion component of the end-point assessment.

## Assessment Gateway

The apprentice will be required to demonstrate the skills, knowledge/understanding and behaviours of a competent Trade Supplier at the gateway stage before undertaking the end-point assessment Knowledge Test, real-life Practical Observation and Professional Discussion.

Apprentices without Level 1 English and Maths must achieve this Level and take the test for Level 2 before taking the end-point assessment.

It is recommended that the employer and nominated training provider agree and sign off that the apprentice has met the requirements of the Assessment Gateway. This will then allow the apprentice to proceed to the end-point assessment process.

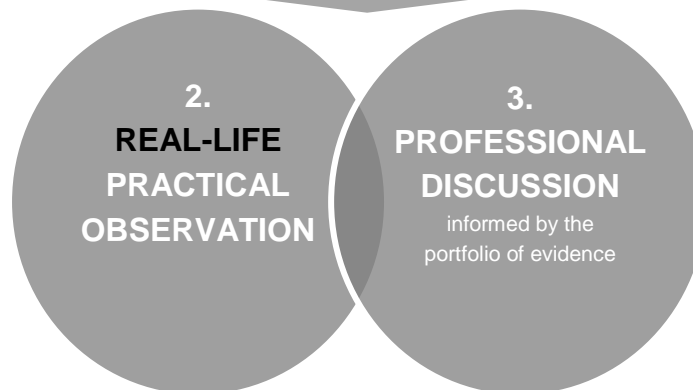
If unsuccessful at the Assessment Gateway, feedback will be given by the employer and nominated training provider to the apprentice to identify areas for development. This development will need to be demonstrated by the apprentice before progressing to end-point assessment. All criteria of the Standard must be evidenced as per the Assessment Strategy.

## End-Point Assessment

The end-point assessment must be completed within a maximum of three months of the Gateway being reached. For the end-point assessment, the apprentice must pass the first component, the Knowledge Test, before the two workplace assessment components take place: a Real-Life Practical Observation and a Professional Discussion (supported by a Portfolio of evidence).

### 1. ONLINE KNOWLEDGE TEST

apprentices must pass the knowledge test before proceeding to the workplace assessment.



Annex 1 lists the elements and assessment methods to be used. There are 50 elements in total to be assessed in the Workplace Assessment: 20 by real-life Practical Observation only; 20 by Professional Discussion only; and 10 which can be assessed either by Practical Observation or by Professional Discussion if they have not been observed in the real-life

situation. The Professional Discussion will be supported by the apprentice's Portfolio of Evidence. This completes all areas to be assessed in the workplace assessment component of the End Point Assessment. This will provide a robust and holistic approach to assessment.

The assessment specification will be set by the approved EPAO(s). The assessment specification will be available from the approved EPAO(s). To ensure consistency across EPAOs, this will include all assessed criteria across all assessment activities.

A scorecard, shown in Annex 1 and the grading criteria detailed below, will be used to identify and record the elements of the Standard and grading criteria observed in the real-life Practical Observation and Professional Discussion.

All components of the assessment must be passed for the apprentice to be deemed competent. The three components will contribute to the final overall grade for the apprentice.

Part 1 of the end-point assessment is:

- 1) **A 60-minute Online Knowledge Test** worth 30 marks, consisting of 15, four-option, multiple-choice questions worth 1 mark each and 5 structured questions (short answer) worth 3 marks each. The bank of questions will be developed by the Trailblazer Group and refreshed every three years in line with the review of the Standard.

The invigilated test, comprising random questions from the bank of questions, will be set and marked by the approved EPAO and scheduled on behalf of the apprentice by the EPAO to take place at a pre-agreed time. The invigilator will be approved by the approved EPAO in line with their invigilation and quality assurance policies and will not have been involved with the on-programme learning and development of the apprentice.

*The Knowledge Test will be delivered in an online format; however additional formats will be made available for apprentices with specific accessibility requirements.*

The Knowledge Test will assess the apprentice's knowledge and understanding of all elements of the Standard pertaining to:

- the nature of a trade supplier organisation
- the nature of a trade customer (eg, compared with a consumer)
- trade counter and telesales services
- the key principles of warehousing and stock control
- the technologies that are appropriate to the role
- legislative responsibilities relating to the business, products and/or services being sold
- how personal responsibilities and performance contribute to the success of the team and the business

Results of the knowledge test will be issued within two-weeks and the apprentice must achieve at least 18 out of 30 marks to pass. The apprentice must pass the knowledge test before continuing on to the workplace components of the assessment. The following table shows the marks to determine the knowledge test grade:

### Knowledge test grading (30 marks)

Fail	Pass	Merit	Distinction
Score <18	18-22 marks	23-25 marks	26+ marks

If the apprentice fails the Knowledge Test, it cannot be retaken for at least one month.

Parts 2 and 3 of the End Point Assessment are Workplace Assessments which comprise a real-life Practical Observation and a Professional Discussion and cover 50 elements of the Standard. (These are detailed in Annex 1.)

- Twenty of the elements must be covered by Practical Observation only.
- Twenty must be covered by Professional Discussion only.
- 10 of the elements must be covered by either Practical Observation and, if not observed, must be addressed in the Professional Discussion.

Each element carries a maximum of 2 marks giving a total of 100 marks for these sections of the End Point Assessment.

2) **The three-hour real-life Practical Observation** will be carried out at the apprentice's place of work by the approved EPAO. During the process the apprentice will be expected to demonstrate to the assessor the knowledge, skills and behaviours of all elements of the trade supplier process including: dealing with customers at the trade counter and over the telephone; elements of processing orders; taking delivery of goods; the basic administration related to these functions.

A scorecard shown in Annex 1 will be used to identify and record the elements of the Standard and grading criteria observed in the real-life Practical Observation. Each element will be graded from 0-2 marks where 0=fail, 1=pass and 2=distinction. The overall marks achieved by the apprentice in this section of the assessment will be added to the marks achieved in the 3<sup>rd</sup> part of the assessment (the Professional Discussion) to make a maximum total of 100 marks. This is to take account of the fact that up to 10 elements of the workplace assessment may not occur in a real-life situation on the day of assessment and may have to be assessed in the Professional Discussion supported by the Portfolio of Evidence.

Following are the grading boundaries for the combined Parts 2 & 3

- 50 marks = fail
- 50-65 marks = pass
- 66-80 marks = merit
- 80 marks = distinction

The following table provides overall descriptors for the levels of skills, knowledge and

behaviours to be expected in each grade band.

**Real-life Practical Observation – general grading descriptors**

<b>Fail</b>	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
-------------	-------------	--------------	--------------------

<p>Fails to provide evidence to meet all knowledge, skill and behavioural requirements as detailed in Annex 1.</p>	<p>Demonstrates the knowledge, behaviours and skills pertaining to the Trade Supplier role for all elements of the Standard detailed in annex 1 including:</p> <ul style="list-style-type: none"> <li>• the organisation;</li> <li>• the trade customer profile of the business;</li> <li>• trade counter and telesales services;</li> <li>• the key principles of warehousing and stock control;</li> <li>• the technologies that are appropriate to the role;</li> <li>• the legislative responsibilities relating to the business, products and/or services being sold;</li> <li>• how personal responsibilities and performance contribute to the success of the team and the business.</li> </ul>	<p>Demonstrates thorough knowledge, behaviours and skills pertaining to the Trade Supplier role for all elements of the Standard including:</p> <ul style="list-style-type: none"> <li>• adapting language, communication style and technique accordingly to gain customer trust and confidence;</li> <li>• effectively listening and identifying a customer's needs to present ranges with confidence and authority;</li> <li>• a detailed, accurate knowledge and understanding of the technical applications of products and services, describing features/benefits to inform purchasing decisions;</li> <li>• the ability to resolve problems and address issues beyond own level of competence;</li> <li>• consistently demonstrating business values, taking pride in personal performance and having good working relationships with people in the team leading to a positive environment.</li> </ul>	<p>Demonstrates knowledge, behaviours and skills that far exceed the requirements of the Trade Supplier role for all elements of the Standard including:</p> <ul style="list-style-type: none"> <li>• communicating 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;</li> <li>• exceeding customer expectations in the presentation of solutions that include a range of products and services, the relevant merits of each, alternatives and complimentary products and services available;</li> <li>• the ability to actively address unexpected situations and complaints with positive outcomes;</li> <li>• all the personal attributes and behaviours required for the Trade Supplier role.</li> </ul>
--------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

- 3) **A 60-minute Professional Discussion** (supported by a Portfolio of Evidence) will be conducted by the assessor in the apprentice's place of work and will take place after the real-life Practical Observation. This will assess the apprentice on:
- i) 20 elements of the Standard as laid down in Annex 1
  - ii) Up to a further 10 elements of the Standard as detailed in Annex 1 which have not been demonstrated in the real-life Practical Observation,
  - iii) knowledge, skills and behaviours using the Portfolio of Evidence as a basis for the oral assessment and discussion.

The Professional Discussion will orally examine the apprentice's overall skills, knowledge and behaviour against the Standard. Performance in the real-life Practical Observation and the Portfolio of Evidence will be used to inform questioning during this discussion.

The Portfolio of Evidence will contain copies of evidence gathered as part of the work role. These can be in the form of 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.

A scorecard (See Annex 1) will be used to identify and record the elements of the Standard and grading criteria observed in the Professional Discussion.

Each element will be graded from 0-2 marks where 0=fail, 1=pass, 2=distinction. The overall marks achieved by the apprentice in this section of the assessment will be added to the marks achieved in the 2<sup>nd</sup> part of the assessment (the real-life Practical Observation) to make a maximum total of 100 marks. This is to take account of the fact that up to 10 elements of the workplace assessment may not occur in a real-life situation on the day of assessment and may have to be assessed in the Professional Discussion supported by the Portfolio of Evidence.

Following are the grading boundaries for the combined Parts 2 & 3.

50 marks	= fail
50 – 65 marks	= pass
66 – 80 marks	= merit
80 marks	= distinction

The following table provides overall descriptors for the levels of skills, knowledge and



behaviours to be expected in each grade band.

### Professional Discussion – general grading descriptors

Fail	Pass	Merit	Distinction
<p>Fails to provide evidence to meet all knowledge, skill and behavioural requirements as detailed in Annex 1.</p>	<p>Demonstrates the knowledge, behaviours and skills pertaining to the Trade Supplier role for all elements of the Standard including:</p> <ul style="list-style-type: none"> <li>• the organisation;</li> <li>• the trade customer profile of the business;</li> <li>• trade counter and telesales services;</li> <li>• the key principles of warehousing and stock control;</li> <li>• the technologies that are appropriate to the role;</li> <li>• the legislative responsibilities relating to the business, products and/or services being sold;</li> </ul>	<p>Demonstrates thorough knowledge, behaviours and skills pertaining to the Trade Supplier role for all elements of the Standard including:</p> <ul style="list-style-type: none"> <li>• an understanding of the organisation's position and thinking about the career opportunities this presents;</li> <li>• identifying the different types of specialist trade customer profiles and understands how and why to adapt language, communication style and technique accordingly;</li> <li>• identifying a customer</li> </ul>	<p>Demonstrates knowledge, behaviours and skills that far exceed the requirements of the Trade Supplier role for all elements of the Standard including:</p> <ul style="list-style-type: none"> <li>• communicating confidently about the organisation's position, including competition and changing sector landscapes, such as new technologies and online trade;</li> <li>• a passion for the industry and sector and proactively exploring learning, development and career progression;</li> <li>• having an in-depth understanding of the</li> </ul>

	<ul style="list-style-type: none"> <li>• how personal responsibilities and performance contribute to the success of the team and the business.</li> </ul>	<p>needs, to be able to match products and present ranges with confidence and authority;</p> <ul style="list-style-type: none"> <li>• a detailed and accurate knowledge and understanding of the technical applications of products and services, accurately describing features/benefits in a way which could inform purchasing decisions;</li> <li>• an understanding of how to resolve problems beyond own level of competence;</li> <li>• consistently demonstrating business values.</li> </ul>	<p>different specialist trade customer profiles that will exceed customer expectations in the presentation of solutions, alternatives and complimentary products and services;</p> <ul style="list-style-type: none"> <li>• proactively seeking to further specialist product knowledge to improve customer experience and business performance;</li> <li>• being a brand ambassador, with a great sense of pride and passion towards the business</li> <li>• ideas to improve health, safety and security knowledge practices in the business;</li> <li>• contributing to the success of the organisation through high-levels of performance, personal attributes, using initiative and sharing ideas.</li> </ul>
--	-----------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

### End-Point – final judgement

The assessment will be developed, implemented and assessed by approved EPAOs on the Register of End-point Assessment Organisations (RoEPAO).

### Independence

It is important to be as inclusive as possible allowing a range of EPAOs the opportunity to independently assess and assure the apprenticeship assessment. All organisations involved in the end-point assessment activities will be approved and on the register held by the Education and Skills Funding Agency.

This proposition is also meant to demonstrate impartiality. Impartiality will be assured by not allowing any agency, organisation or service who has been involved in the delivery of the apprenticeship programme to be a part of the end-point assessment or to be involved in it.

## Grading Criteria

Following the end-point assessment, the Apprentice will be confirmed in their final grade.

In order to be a competent worker and successfully complete the apprenticeship, a pass grade must be achieved in all three components of the end-point assessment.

Merit builds on the demonstration of pass criteria and distinction builds on both pass and merit.

**Pass** – An apprentice will only achieve a pass if they have performed at pass level in all components of the end-point assessment

**Merit** – An apprentice will only achieve a merit if they performed at merit level when marks are aggregated in the Practical Observation and Professional Discussion and at least a pass level in the Knowledge Test.

**Distinction** – An apprentice will only achieve a distinction if they have performed at distinction level when marks are aggregated in the Practical Observation and Professional Discussion and at least at merit level in the Knowledge Test.

Knowledge Test	Real-Life Practical Observation & Professional Discussion Combined	Overall Grade
Pass	Pass	<b>Pass</b>
Minimum grade of pass	Merit	<b>Merit</b>
Minimum grade of merit	Distinction	<b>Distinction</b>

The apprentice must pass the knowledge test before progressing on to the workplace assessment – real-life Practical Observation and Professional Discussion. The apprentice has the opportunity to take one re-sit of the online knowledge test.

The apprentice must pass the real-life Practical Observation and Professional Discussion components of the workplace assessment to be deemed competent. The apprentice has one opportunity to re-sit the workplace assessment and must re-sit both the real-life Practical Observation and the Professional Discussion components.

If an apprentice has to re-sit any of the components of the end-point assessment the maximum grade that can be achieved is a pass.

A standard appeals policy in relation to all components of the end-point assessment (Knowledge Test, Practical Observation and Professional Discussion) will be developed by the approved EPAO(s).

## End-Point – Summary of Roles and Responsibilities

Role	Responsibilities
Employer	The employer, following consultation with the training provider, should sign off that the apprentice has achieved the requirements of the Assessment Gateway and is ready to proceed to the end-point assessment process.
Training Provider	The training provider, together with the employer, should sign off that the apprentice has achieved the requirements of the Assessment Gateway and is ready to proceed to the end-point assessment process.
EPAO	The approved EPAO will develop, implement and assess the apprentice on the three components of the end-point assessment.

### **Internal Quality Assurance (IQA)**

EPAOs must have in place a robust mechanism for internal quality assurance. This should include the ongoing monitoring and support of the independent assessment team, including regular standardisation meetings. Standardisation meetings should be undertaken annually to ensure the assessment system is consistent and reliable.

Internal quality assurance must be completed by an appropriately qualified person, and that person must not have been involved in any aspect of the delivery or assessment of the programme they are quality assuring.

Independent EPAOs who wish to offer end point assessment against the standard will need to be on the Education and Skills Funding Agency's Register of End-point Assessment Organisations (RoEPAO).

### **External Quality Assurance (EQA)**

OFQUAL will provide External Quality Assurance, for this apprenticeship.

The requirements for entry onto the Register of End-point Assessment Organisations (RoEPAO) together with OFQUAL managing the external quality assurance of End Point Assessments within the same framework used for regulated qualification will allow Employers to choose between different Apprenticeship EPAOs with confidence.

As there is the potential for multiple Apprenticeship EPAOs to develop End Point Assessments from this Assessment Plan, employers need to be assured that there are sufficiently adequate independent External Quality Assurance arrangements in place to ensure, that over time, standards can be properly maintained.

The chosen EQA arrangements are intended to ensure consistency of quality and approach to assessment from all of the Apprenticeship EPAOs developing and delivering End Point Assessments against this Assessment Plan. Where there is more than one Apprenticeship EPAO developing End Point Assessments based on one Assessment Plan it is encouraged that organisations work together on approaches to assessment to assist with comparability of End Point Assessment.

Any appeals related to End Point Assessment would expect to follow the OFQUAL requirements for handling such events.

**Implementation****Affordability:**

The knowledge test will be delivered in an online format where appropriate, to ensure cost savings to the end-point assessment and any subsequent resits.

The ability to access standardised, pre-moderated assessment materials should also represent a financial saving whilst also helping with consistency.

Though there is an initial resource implication connected with ensuring assessors are appropriately trained and professionally recognised as members of an approved EPAO, once suitably qualified/recognised assessors are in place, annual training and standardisation activities will take place to ensure competency of independent assessors.

The delivery cost of the end-point assessment will be no more than 20% of the overall funding available.

**Consistency:** will be achieved through the use of approved EPAOs that will adhere to the Assessment Plan; the availability of standardised, pre-moderated assessment materials; a risk based sampling strategy for internal quality assurance; the external quality assurance process provided by OFQUAL.

**Volumes:** It is estimated that there will be 1,000 starts per annum.

## Annex 1

### End-Point Assessment Method and Scoring Guide

The end-point assessment comprises three components: an Online Knowledge test, which the apprentice must pass before proceeding to the workplace assessment. The workplace assessment is made up of two components: a real-life Practical Observation followed by a Professional Discussion.

This Annex lists the elements to be assessed in the real-life Practical Observation in line with the Standard as well those **not** observed during the Practical Observation which must then be covered in the Professional Discussion supported by the Portfolio of Evidence. This completes all areas to be assessed in the workplace assessment component of the End Point Assessment and will provide a robust and holistic approach to assessment.

Following is a key to the acronyms used in the Scoring Guide Table below as well as the marks to be awarded for each grade in Practical Observation and the Professional Discussion components of the EPA.

Key	Assessment Method	Fail	Pass	Distinction
KT	Knowledge Test	N/A	N/A	N/A
PO	Real-Life Practical Observation	0	1	2
PD	Professional Discussion	0	1	2

### Scoring Guide

To better facilitate consistency of grading, each of the 50 elements to be assessed under the real-life Practical Observation or the Professional Discussion is listed below and each is worth up to a maximum of 2 points.

There are 20 elements to be assessed in the real-life Practical Observation component of the assessment only.

There are 20 elements to be assessed in the Professional Discussion component of the assessment only.

There are 10 elements that can be assessed in either the Practical Observation or the Professional Discussion supported by the Portfolio of Evidence if the element has not been observed in the workplace.

There is an aggregate score of 100 marks available for the real-life Practical Observation and the Professional Discussion.

The points gained in the Knowledge Test (ref page 4 of the Standard) will form part of the overall grade but are not covered in this Scoring Guide.



Knowledge and understanding of the organisation	Pass Criteria	Distinction Criteria			
Structure, mission, objectives and culture and how the role contributes to its success.	State the aims of the organisation in relation to its sector, and explain why the organisation's core values are linked to its success	Share ideas of how their role can improve success of their organisation	KT		PD
Position in the flow of goods and services, between the manufacturer and the customer.	Explain the organisation's process to provide customers with products obtained from manufacturers	Describe the process for obtaining goods for a customer which are not stocked items	KT		PD
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.	Describe the opportunities available in the organisation to gain and maintain knowledge about the products/service offer to customers	Proactively seek to further specialist product knowledge to improve customer experience and business performance	KT		PD
Internal policies and procedures, how these relate to the role and interact with legislative obligations.	Give examples of how relevant legislation and regulations affect the organisation, and how they are maintained through the organisation's internal policies	Explain the potential impact on the organisation if it fails to adhere to relevant legislation and regulations	KT		PD
Vulnerability to situations that pose risk to the brand and/or business reputation.	State their responsibilities for keeping brand and business reputation safe from risk	Explain how to identify any potential risks to the brand and business reputation and propose possible solutions	KT		PD
Skills					
Communicating confidently to internal and external customers about the company and how it operates.	Explain the organisation's service offer to internal and external customers and how the organisation operates in line with its standards	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		PO	

Identifying and communicating with the relevant person if a threat or risk to the business is identified.	Explain who should be notified in a situation which poses a risk to the organisation	Actively monitor situations that pose potential risk and take responsibility to ensure these are resolved			<b>PD</b>
<b>Knowledge and understanding of the specialist trade customer profile of the business</b>	<b>Pass Criteria</b>	<b>Distinction Criteria</b>			
Identify specialist customer needs.	Offer the appropriate product or service options to meet the identified needs of the customers	Demonstrate the ability to offer alternative, additional or complementary products or services to meet the identified needs of customers	<b>KT</b>	<b>PO</b>	
Recognise how to be an effective listener.	Display active listening skills	Demonstrate the use of active listening to build and help formulate ideas to generate solutions	<b>KT</b>	<b>PO</b>	
Recognise the difference between internal and external customers and the relationship between customer satisfaction and organisational performance.	Explain the difference between internal and external customers in the context of their organisation	Explain the difference in the way internal and external customer relationships are managed	<b>KT</b>		<b>PD</b>
<b>Skills</b>					
Using appropriate techniques and forms of communication to put customers at ease and gain their trust.	Demonstrate adaptability in the service approach to meet the needs of customers and build their trust	Use initiative to improve sales and/or improve customer service by use of specialist customer knowledge		<b>PO</b>	
Delivering customer service that exceeds customer expectations.	Supply a service/product range to the customer that is not normally available	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		<b>PO</b>	<b>PD</b>

Identifying customer requirements and referring them onwards in an appropriate manner.	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.	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		PO	
<b>Knowledge and understanding of trade counter and telesales services and how to;</b>	<b>Pass Criteria</b>	<b>Distinction Criteria</b>			
Recognise the products, services and language used by trade customers and the technical application of those product and services.	Demonstrate how establishing the facts allows for a customer focused experience and appropriate response	Explain the difference between the features and benefits of products and/or services to the customer	KT	PO	
<b>Skills</b>					
Assisting customers in exploring product ranges and alternative and complimentary products and services, based on the fundamental underpinning product knowledge.	Demonstrate a knowledge of how to identify additional products/services the organisation has to offer	Demonstrate product knowledge and understanding that is over and above what a customer can find for themselves		PO	
Identifying the customers' requirements, matching them to the trade supplier's products and services.	Display good communication skills to identify customers' needs and reflect this in the offer to the customer	Accurately describe the features and benefits of products and services to customers in a way that helps them make an informed decision		PO	
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.	Demonstrate good listening skills and make recommendations of suitable products and services available based on technical specification	Demonstrate breadth of knowledge around product benefits, providing insight into usefulness of product specifications		PO	
Securing a trade sale using appropriate	Demonstrate good negotiation skills. Show	Demonstrate genuine rapport with		PO	

selling techniques, both face to face and on the telephone, and methods to complete the transaction.	confidence when dealing with different customer and transaction types operating within limits of authority	customers and off script when engaging with them			
Applying basic merchandising techniques used within the business.	Display an understanding of the importance of clean and tidy housekeeping	Demonstrate how to maximize the creative use of space throughout the display area		PO	PD
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.	Occasionally offer associated products to complement those requested by the customer	Always use upselling and link selling techniques with all customers in order to secure, complete and increase sales transactions		PO	PD
Communicating with customers using various methods and systems appropriate to the situation.	React promptly to customers: arriving at the Trade Counter; upon receipt of an email; or in response to a ringing telephone.	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		PO	
Applying the key principles of administration and working practices to accurately prepare, store, communicate and process businesses documentation.	Demonstrate an understanding of systems and procedures involving documentation as well as company policy on document and information retention.	Provide ideas of how working practices could be improved, providing cost and time saving efficiencies to the business		PO	PD
Processing information, to the key standards of data protection, security and intellectual property rights.	Demonstrate awareness of legislation and treat confidential information correctly in line with company policy	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			PD
<b>Knowledge and understanding of the key principles of warehousing and stock control</b>	<b>Pass Criteria</b>	<b>Distinction Criteria</b>			
The safe movement, storage and stock control of products within the trade supplier environment.	Describe company procedure and correct Personal Protective Equipment (PPE) requirements for the safe movement,	Explain ways in which to improve the procedure and the extra steps taken to reduce any risks further	KT	PO	

	storage and stock control of products				
<b>Skills</b>					
Processing and recording the receipt, storage, assembly and despatch of goods.	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	Use own initiative to resolve any issues in line with procedure, professionally communicating with suppliers, colleagues and drivers		<b>PO</b>	
Receiving stock, despatching customer orders and processing returns in line with company processes.	Always follow procedure and pass information on when something is wrong	Use own initiative to resolve any issues in line with procedure, professionally communicating with relevant parties		<b>PO</b>	
Loading/unloading of supplier and contractor vehicles.	Follow company procedure and Health and Safety Regulations in the loading and unloading of supplier and customer vehicles	Demonstrate own initiative when dealing with suppliers and exercises extreme care and caution when loading and unloading whilst liaising with the driver		<b>PO</b>	
<b>Knowledge and understanding of the technologies that are appropriate to the role</b>	<b>Pass Criteria</b>	<b>Distinction Criteria</b>			
Benefits and potential limitations of technology in the workplace.	Describe benefits of the use of technology in interactions in the workplace and indicate instances when direct interaction is preferable	Describe how correct choice of direct interaction or the use of technology can be of benefit to the business	<b>KT</b>		<b>PD</b>
Different technologies and how they support the operation of the business.	State the different systems or equipment used in the organisation	Provide an explanation of how systems can add value to the business	<b>KT</b>		<b>PD</b>
<b>Skills</b>					
Using technology appropriately and efficiently in line with business policy, e.g. Point of Sale Machines, PCs.	Demonstrate basic use of the different systems, equipment or technology used in the organisation	Demonstrate fluency of use of the different systems, equipment or technology used in the organisation		<b>PO</b>	

Demonstrating the use of various technologies, e.g. bespoke/in house or off the shelf software packages to others.	Demonstrates basic knowledge of appropriate software tools used by the organisation	Demonstrates advanced knowledge of appropriate software tools used by the organisation		<b>PO</b>	
<b>Knowledge and Understanding of legislative responsibilities relating to the business, products and/or services being sold</b>	<b>Pass Criteria</b>	<b>Distinction Criteria</b>			
Importance of health, safety and security in a trade supplies environment, and the consequences of not following legal guidelines.			<b>KT</b>		
<b>Skills</b>					
Complying with legal requirements to minimise risk and build customer confidence.	Explain how the relevant legislation and regulations impact upon the organisation's customer service provision	Provide ideas to improve health, safety and security knowledge practices in the business			<b>PD</b>
Minimising disruption to the business and maintaining the safety and security of people at all times.	Explain how the relevant legislation and regulations affect the day to day running of the business and ensure that business is not disrupted	Provide examples of active involvement in maintaining safety and security of people and ensure resolution of identified risks			<b>PD</b>
Taking appropriate action if a breach of H&S regulations is identified.	Show or explain what action is required when a breach of Health and Safety regulations is observed	Show or explain what proactive steps could be taken to reduce risks before they become breaches of Health and Safety Regulations.		<b>PO</b>	<b>PD</b>
<b>Knowledge and Understanding of how personal responsibilities and performance contribute to the success of the team and the business</b>	<b>Pass Criteria</b>	<b>Distinction Criteria</b>			

Understand the impact of personal behaviour and actions on the team.	State how personal behaviour and actions can have an impact on the team	Describe how having a positive attitude can impact the team you work with and how this can improve overall team performance	KT		PD
Recognise and comply with organisational standards of presentation and behaviour.	Follow business requirements of personal presentation (including Personal Protective Equipment)	Explain the benefits of complying with organisational standards for presentation and behaviour and how this can impact on customers' expectations	KT	PO	
<b>Skills</b>					
Building two-way trust and contributing to working within a team	Carry out tasks with consideration for others. Seek help and support from others when appropriate	Provide feedback to colleagues on performance and actively seek feedback in order to identify areas for improvement		PO	
Collaborating with colleagues to resolve problems.	Take a systematic approach to problem solving, know their own limits and when best to escalate issues	Demonstrate ability to actively address unexpected situations and complaints to achieve positive outcomes		PO	PD
Managing personal performance by completing tasks to agreed standards and timescales and by taking action to resolve problems and communicating issues beyond own level of competence.	Know what they need to do in their role and complete all tasks to agreed timescales and standards	Contribute to the success of the organisation through high-levels of performance, applying positive personal attributes, using initiative and sharing ideas		PO	PD
Demonstrating effective time management through planning and prioritising own workload.	Is punctual and routinely meets deadlines	Prioritise future tasks and react to unexpected situations positively			PD
Identifying own strengths weaknesses and development needs.	Independently and regularly reflect on progress and set goals and priorities for future development	Demonstrate a passion for the industry and sector and proactively explore learning, development and career progression			PD
<b>Behaviours</b>					
Adopts an approachable and friendly	Demonstrate a range of methods of	Demonstrate a wide range of methods of		PO	

manner, interacting with customers in the style of the business.	communication, usually adapting these to meet the needs of the customer	communication, and adapt the method used (including language and type of communication) to build rapport and exceed the expectations of the customer			
Takes an active interest in the range of products and services offered by the business.	Show awareness of the products and services offered by the business and know basic specifications and information	Use available systems and information to understand the range of services and products offered by the business to update own knowledge			<b>PD</b>
Works with integrity in an honest and trustworthy manner.	Work in a fair and honest manner. Can be trusted to work with limited supervision	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			<b>PD</b>
Demonstrates adaptability and flexibility in own performance.	Show flexibility to meet the needs of the organisation	Volunteer for additional tasks and responsibilities as required by the organisation. Can recommend different ways of working when appropriate		<b>PO</b>	<b>PD</b>
Shows an organised and committed approach, with a positive attitude.	Be organised and committed with a positive attitude when carrying out the role	Remain organised and committed with a positive attitude when under pressure		<b>PO</b>	
Takes ownership and responsibility for own performance, is diligent and accurate.	Can be trusted to work on their own. Can take responsibility for their own mistakes	Welcome feedback and actively seek to improve personal performance		<b>PO</b>	<b>PD</b>
Supports equality and diversity in the workplace.	Is aware of the company equality and diversity policies and processes and knows how they apply to them and others in the workplace	Actively supports equality and diversity in the workplace by reporting issues and concerns when identified			<b>PD</b>
Uses appropriate Personal Protective Equipment and operates machinery safely and effectively.	Uses the correct Personal Protective Equipment (PPE) for the appropriate machinery to operate it safely	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		<b>PO</b>	<b>PD</b>



Consistently takes into account company environmental and sustainability policies and procedures.	Can describe how to apply company environmental and sustainability policies and procedures	Can explain how company environmental and sustainability policies have a positive impact on the wider environment			<b>PD</b>
---------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------	--	--	-----------