

Sales Executive Apprenticeship Standard Level 4

End-Point Assessment Plan

1. Introduction and Summary

This document sets out the requirements for end-point assessment (EPA) for the Sales Executive Level 4 apprenticeship standard. It is written for end-point assessment organisations who need to know how EPA for this apprenticeship must operate. It will also be of interest to sales executive apprentices, their employers and training providers.

Full time apprentices will typically spend 18 months on-programme working towards the apprenticeship standard, with a minimum of 20% off-the-job training.

The EPA should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the standard, the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPA organisation.

The EPA must be completed over a maximum total assessment time of 16 weeks after the apprentice has met the EPA gateway requirements.

Apprentices without level 2 English and maths will need to achieve this level prior to taking the end-point assessment. For those with an education, health and care plan or a legacy statement the apprenticeships' English and maths minimum requirement is Entry Level 3 and a British Sign Language qualification is an alternative to English qualifications for whom this is their primary language.

EPA must be conducted by an organisation approved to offer services against this standard, as selected by the employer, from the Education & Skills Funding Agency's (ESFA) Register of End-Point Assessment Organisations (RoEPAO).

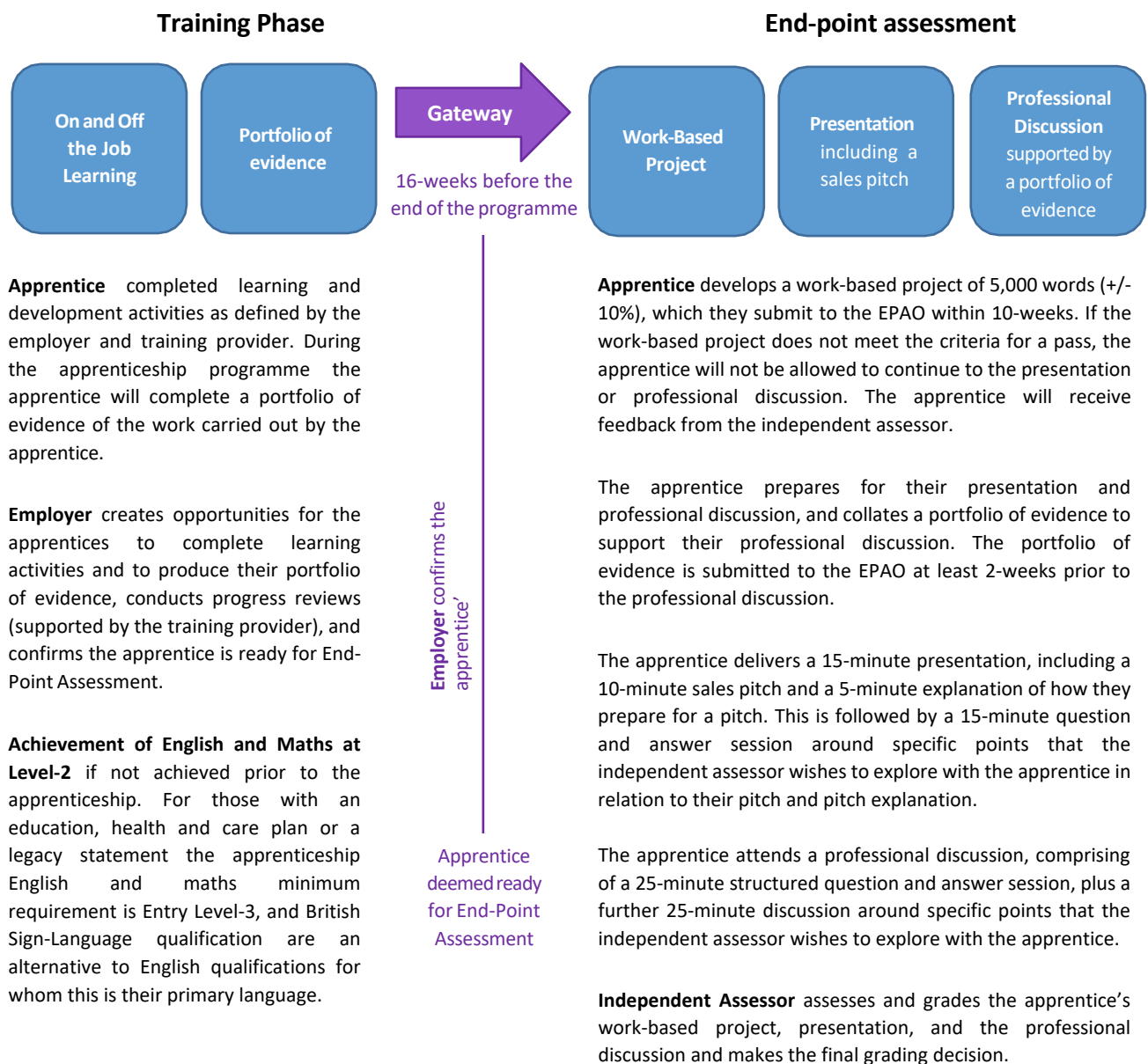
Performance in the EPA will determine the apprenticeship grade of fail, pass or distinction.

The EPA consists of three distinct assessment methods, listed below, and both of them must be passed for the apprentice to successfully complete the apprenticeship programme:

1. Work-Based Project
2. Presentation, including a sales pitch, with questions and answers
3. Professional Discussion supported by a portfolio of evidence, including;
 - A structured Q&A session
 - An exploratory discussion

(An overview of the assessment approach is also illustrated in Figure 1 overleaf).

Figure 1: Overview of the end-point assessment approach



2. End-Point Assessment Gateway

The EPA should only start once the employer is confident that the apprentice is consistently working at or above the level set out in the standard, the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPAO.

EPA Gateway requirements:

- Completion of the off-the job learning components of the programme.
- Confirmation from the employer that the apprentice is ready. It is recommended that the training provider is consulted by the employer to inform the decision.
- Apprentices without Level 2 English and maths will need to achieve this level prior to taking end-point assessment. For those with an education, health and care plan or a legacy statement the apprenticeships English and maths minimum requirement is Entry Level 3 and a British Sign Language qualification is an alternative to English qualifications for those whom this is their primary language.
- Completion of a portfolio of evidence (see 2.1 below).
- Agreement by the apprentice's employer and an independent assessor of a work-based project and a presentation to be produced during the EPA period. The agreed project start date will mark the start of the apprentice's 16-week EPA period.

2.1 Portfolio of evidence

Throughout the training phase, apprentices will keep a portfolio of their work in relation to the standards and assessment criteria and their application of the required knowledge, skills and behaviours. This portfolio will be used to support the professional discussion, but it will not be assessed or graded as part of the EPA. The apprentice must provide sufficient evidence within their portfolio to satisfy all of assessment criteria linked to the professional discussion, as outlined in appendix 2.3. Examples of evidence are:

- individual learning and development plans;
- witness testimonies;
- written reports;
- sales pitches;
- client feedback;
- training logs.

Reflective accounts are not permissible as evidence.

The portfolio is required to be made available to the assessor in an electronic format 2-weeks prior to the date of the professional discussion.

3. End-point Assessment Methods, Timescales & Location

The end-point assessment (EPA) is specifically designed to test the occupational competence of the apprentice to undertake the Sales Executive job role and the assessment approach will cover all the knowledge, skills and behaviours defined in the standard.

The EPA consists of three distinct assessment methods:

1. Work-Based Project
2. Presentation, including a sales pitch, with questions and answers
3. Professional discussion supported by a portfolio of evidence, including;
 - A structured Q&A session
 - An exploratory discussion

The EPA must be completed over a maximum period of 16 weeks after the apprentice has met the EPA gateway requirements. The work-based project start date will mark the start of the EPA period. Requirements for each assessment method are detailed below. The KSB assessment methodology in Appendix 1 lists which assessment methods assess which KSBs and Appendix 2 defines the grading criteria for each KSB.

Work-Based Project

- The work-based project will be based on work the apprentice has carried out after the gateway. The EPAO will provide a list of topics for the work-based project for the apprentice to select from. The topic/title will be, designed to allow the apprentice the opportunity to evidence all of the KSBs mapped to this assessment method. The list of topics/titles must be maintained by the EPAO to prevent predictability and must allow it to contribute to the employer's business.
- The topic selected must be agreed by both the EPAO and the employer before the work-based project start date. A template will then be provided by the EPAO as a framework for the apprentice to use ensuring the project includes evidence of how the KSBs have been applied with real customers in a work-based context. The project will assess the elements of the standard highlighted in Appendix 1, using the criteria laid out in Appendix 2.
- The apprentice will have 10 weeks to complete the project and must submit it to the independent assessor at the end of the 10 weeks, allowing the independent assessor to mark/grade the project and to confirm that the apprentice has passed (or has passed with distinction). Please see the section on resits/retakes for guidance on if the apprentice fails this assessment method.
- The word count for the project is 5,000 words (+/- 10%) excluding annexes and references.
- A typical structure for the work-based project may include:
 - Objectives for sales planning and preparation
 - Organisation knowledge and its context in selling products and/or services
 - Understanding customer(s) requirements, markets and challenges
 - Proposing and presenting solutions and option(s)
 - Understanding of sales approaches and rationale in your organisation

- Reflection on customer discussions and decisions to feedback to organisations
- Conclusion and learning outcomes for ongoing professional development
- Appendix: Cross-referencing to the KSBs identified in Appendix 1

Presentation

The IA must be sent a copy of the presentation 10 working days in advance of the delivery by the apprentice, to allow them to prepare their questions.

A 10-minute (+10% at the discretion of the independent assessor in order to provide scope for an apprentice to demonstrate their full abilities) presentation, plus a 15-minute (+ 10% again at the discretion of the independent assessor), question and answer session, to include:

- A 10-minute sales pitch of the apprentice's organisation's product(s) and/or service(s) demonstrating how they positively differentiate their product(s) and/or service(s).
- A 5-minute explanation of how they prepare for a sales pitch.
- A 15-minute question and answer session around specific points that the independent assessor wishes to explore with the apprentice in relation to their pitch and pitch explanation. Prior to the presentation and questioning, the independent assessor must have prepared 6 questions for the questioning element based on the subject matter. However, the questions may be modified to take account of the presentation evidence.

The independent assessor will provide a brief to the apprentice at the gateway to explain how the presentation should be structured. The presentation must be delivered verbally, either face-to-face or via video conference, and may also include reference to physical material or digital content. Where physical material or digital content is referenced, copies of this must be provided to the independent assessor at least 2-weeks prior to the presentation date for the independent assessor to retain.

The presentation should take place immediately prior to the professional discussion. However, as previously mentioned, this stage of end-point assessment will not take place if the apprentice has not first passed the work-based project.

Professional discussion supported by a portfolio of evidence

A professional discussion between the apprentice and the independent assessor will also be used to ensure the apprentice has met the knowledge, skills, behaviour requirements of the standard.

The purpose of the professional discussion is to confirm and validate assessment of the criteria laid out in Appendix 1. It will be used to:

- Explore specific aspects of the apprentice's work, including how it was carried out.
- Enable the apprentice to talk through their learning on aspects of their work, allowing the assessor to question them on this.
- Provide enough evidence for the independent assessor to assess and grade the apprentice.

The professional discussion will be informed by the portfolio of evidence that will be used by the independent assessor to inform their approach to the discussion, and by the apprentice as a source of evidence to help support their responses. The professional discussion should last for 50 minutes (+10% at the discretion of the independent assessor). It will be structured as follows:

- A 25-minute question and answer session that comprises 5 structured questions, developed by the end-point assessment organisation in line with appendix 1. EPAOs must develop question banks of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure they are fit for purpose.
- The apprentice will not see the structured questions before the EPA. The independent assessor may also ask additional follow-up questions if required. The questions will address the KSBs identified for assessment within the professional discussion as identified in appendix 1. Questions will be in line with the expectation of a Level 4 apprenticeship.
- A 25-minute discussion around specific points that the independent assessor wishes to explore with the apprentice which apply to the KSBs for this assessment method: what they did, what they have learnt, results, what they would do differently etc.

The independent assessor must ensure that the professional discussion is conducted in a suitable environment free from distraction. It is anticipated that EPAOs will use the apprentice's employer's premises wherever possible to minimise costs. It may be conducted face to face or via an online platform, e.g. video conferencing. EPAOs must ensure appropriate methods to prevent misrepresentation are in place should an online option be used.

The professional discussion will take place immediately after the presentation. However, as previously mentioned, this stage of end-point assessment will not take place if the apprentice has not first passed the work-based project.

4. Grading

Grading criteria for a 'Fail', 'Pass' and 'Distinction' have been developed and can be found within appendix 2. It will be the responsibility of the end-point assessment organisation (EPAO) to ensure that these criteria are applied fairly and consistently.

The independent assessor must individually grade each assessment method - fail, pass or distinction according to the requirements set out in this plan. Restrictions on grading apply where apprentices resit or re-take an assessment method – see section 5.

An independent assessor must combine the grades of all the assessment methods to determine the EPA grade. To achieve an EPA pass, apprentices must achieve a pass in all assessment methods. To receive a distinction - 75% or more of the KSBs within each assessment method must be demonstrated at distinction, with all other KSBs demonstrated at the pass criteria.

To achieve an EPA distinction, apprentices must achieve a distinction in all assessment methods. If they fail any one method, then they will get a fail.

The grading decision will be made by the independent assessor and in coming to their decision they will review all the evidence provided.

If the apprentice does not achieve a pass or a distinction for the work-based project they are unable to proceed to the presentation or professional discussion. For further information on re-sits and re-takes please see section 5.

If the presentation or the professional discussion **do not** meet the 'Pass' criteria, the apprentice will be deemed to have failed. The independent assessor will give the apprentice appropriate feedback and a request for further evidence (RFE) will be included for a presentation or professional discussion re-sit or re-take as appropriate.

5. Resits/Retakes

Apprentices who fail one or more EPA method will be offered the opportunity to take a re-sit/retake. Re-sits/re-takes must not be offered to apprentices wishing to move from pass to distinction. A re-sit does not require further learning, whereas a re-take does.

The apprentice's employer will need to agree that a re-sit/re-take is an appropriate course of action. Apprentices should have a supportive action plan to prepare for the re-sit/re-take.

An individual EPA method re-sit/re-take must be taken within a 6-month period otherwise the entire EPA must be resat/retaken.

The maximum grade awarded to a re-sit/re-take will be pass, unless the EPAO identifies exceptional circumstances accounting for the original fail.

Independent assessors must ensure that apprentice answer different questions during their professional discussion, and deliver a presentation based on a different brief when taking a re-sit/re-take.

If the apprentice fails the project assessment method, they will be required to amend the project output in line with the independent assessor's feedback. The apprentice will be given 4 weeks to rework and submit the amended report.

Any appeals in relation to the outcome of the EPA will be managed by the apprentice's EPAO whose decision is final.

6. End-point Assessment Organisations

Employers must choose an independent EPAO approved to deliver the EPA for this apprenticeship from the Education & Skills Funding Agency's (ESFA) Register of End Point Assessment Organisations (RoEPAO).

Requirements for the roles and responsibilities of those involved in the End-Point Assessment

<u>Role</u>	<u>Responsibilities</u>
Employer	<p>Brings a view of the apprentice from the perspective of</p> <ul style="list-style-type: none"> • To arrange and provide training and experiences for the apprentice to gain the knowledge, skills and behaviours specified in the apprenticeship standard. • Supporting them through the apprenticeship. • Helping them reflect on their performance on-programme. • Having an understanding of their performance throughout their apprenticeship and their potential to perform beyond it. • To sign off the apprentice as consistently working at or above the level of the standard (employer gateway) <p>Note: the employer is not involved in the EPA process or decision on final grade awarded.</p>
Training Provider	<ul style="list-style-type: none"> • To arrange and provide training for the apprentice to gain the knowledge, skills and behaviours specified in the apprenticeship standard. • Supporting them through the apprenticeship. • Helping them reflect on their performance on-programme. • Having an understanding of their performance throughout their apprenticeship and their potential to perform beyond it. • Ensuring the apprentice is responsible for collating their portfolio in preparation for the end point assessment. <p>Note: the training provider is not involved in the EPA process or decision on final grade awarded.</p>
End-Point Assessment Organisation	<ul style="list-style-type: none"> • Must be independent of the on-programme delivery, the apprentice and their employer. • Registered on the ESFA Register of End-Point Assessment Organisations (RoEPAO). • Provides guidance for apprentices, training providers and employers on the EPA. • Develops tools for collecting and measuring evidence. • Recruits, and if required, trains independent assessors. • Has effective quality assurance and quality control processes in place that support valid assessments. • Holds CPD and standardisation events for the independent assessors. <p>Note: the End-Point Assessment Organisation is not involved in on-programme activities.</p>
Independent	<ul style="list-style-type: none"> • Must be independent of the on-programme delivery, the apprentice

Assessor	<p>and their employer.</p> <ul style="list-style-type: none"> • Carries out independent assessment of the apprentice and makes the final decision on whether the apprentice meets the knowledge, skills and behaviours in the standard. • Assesses the work-based project, the presentation and the professional discussion and awards fail, pass or distinction. • Attends annual standardisation events. • Undertakes ongoing CPD.
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7. Internal quality assurance

End-Point Assessment Organisations (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.

EPAOs for this standard must operate as a minimum the following:

- Operate moderation of assessment activity and decisions, through examination of documentation and observation of activity, with a minimum of 5% of each independent assessors' assessments moderated.
- Appoint independent assessors that meet the requirements as detailed in this plan.
- Produce assessment tools and supporting materials for EPA that follow best assessment practice.
- Provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading.
- Have quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation over time.
- Operate regular standardisation events that enable independent assessors to attend a minimum of one event per year.
- Have a robust appeals procedure in place.

In order to ensure consistency and ensure employer's confidence in the apprentice's assessment in different parts of the country, at different times, by different independent assessors, all EPAOs have a responsibility to ensure sufficient standardisation events are attended and Continuing Professional Development (CPD) requirements are met.

Independent assessors involved in the assessment of this apprenticeship must be specialists in the field and occupationally competent. Independent assessors must be registered with an EPAO.

All assessment tools must be developed by the EPAO and updated as a minimum on an annual basis.

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 assessors must either:

- Hold a personal training qualification at level 3 or higher;
- or
- Hold a recognised workplace assessment qualification that addresses the assessment of both skills and knowledge. For example:
 - Level 3 Certificate in Assessing Vocational Achievement (CAVA), or A1, or D32/33
 - Have approval from a recognised professional body in sales as an approved assessor of sales qualifications or apprenticeships
- or
- Have 5 years' experience in sales training, enablement or operations

And:

- Undertake and record planned and relevant Continuous Professional Development. A minimum of 24 hours per annum is expected covering both vocational and assessment competence.

Assessment tools and materials

The EPAO organisation must produce the following:

- A template for the work-based project.
- A brief to explain how the presentation should be structured.
- Sample questions for the professional discussion which will be reviewed annually. Five structured questions will be asked within each professional discussion, covering the KSBs identified in Appendix 1. The EPAO will develop a question bank of an appropriate size to avoid predictability over time. The independent assessor may also ask additional follow-up questions if required.
- Documentation for recording assessment evidence and decisions.

8. External quality assurance

External quality assurance for this apprenticeship standard will be undertaken by Ofqual.

9. Affordability & Implementation

A key driver for the assessment approach has been to ensure the approach is consistent and directly linked to the standard. The costs and practicality of assessment have been key considerations in the

development of this and it will be easy to manage regardless of employer organisation size or the number of apprentices.

Where appropriate, technology such as e-portfolios and video conferencing will be used to minimise costs and disruption for the employer and the employee. Where remote technologies are utilised, verification of the apprentice's identity must take place prior to assessment.

10. Anticipated Volumes

It is expected that there will be around 500-750 participants per year on the apprenticeship in the first three years, subsequently increasing to around 1500 per year. This is based on the feedback and enquiries received via The Association of Professional Sales (APS) Corporate Members, employers approaching the APS with interest in this apprenticeship and training providers who have also received interest in this apprenticeship

11. Professional Body Recognition

On completion, apprentices will be eligible to apply for professional sales certification at level 4 within the Institute of Sales Professionals (ISP's) certification framework.

Appendix 1 – KSB Assessment Methodology

The following table outlines which assessment method(s) will be used for each knowledge, skill or behavior.

<u>Knowledge</u>	<u>Method(s)</u>	<u>Skills</u>	<u>Method(s)</u>	<u>Values & Behaviours</u>	<u>Method(s)</u>
Organisational knowledge	PR	Sales planning and preparation	WBP	Ethics and integrity	PD
Product, service and sector knowledge	PR	Customer engagement	WBP	Proactivity	WBP
Market knowledge	PR	Customer needs analysis	WBP	Self-discipline	PD
Customer knowledge	WBP	Propose and present solutions	WBP	Resilience and self-motivation	PD
Commercial and financial acumen	WBP	Negotiate	WBP	Continuous professional development	PD
Digital knowledge	PR	Closing sales	WBP		
		Gathering intelligence	WBP		
		Time management	PD		
		Collaboration and teamwork	PD		
		Customer experience management	PD		
		Digital skills	PD		

KEY

WBP = Work-Based Project

PR = Presentation

PD = Professional Discussion (supported by the portfolio of evidence)

Appendix 2.1: Sales Executive Apprenticeship Grading Criteria (Work-Based Project)

Grading Knowledge Outcomes (Work-Based Project)

Standard	'Fail' Criteria (the apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria.)	'Pass' Criteria (To achieve a pass, the apprentice must meet all of the pass criteria)	'Distinction' Criteria (To receive a distinction - 75% or more of the KSBs within the assessment method must be demonstrated at distinction, with all other KSBs demonstrated at the pass criteria).
<p>Customer knowledge</p> <p>Know how to analyse the macro and micro environment of individual customers. Understand the challenges and purchasing motivations of your customers and the internal and external factors that impact their purchasing decisions. Understand expectations of what constitutes a high-quality customer experience.</p>	<p>Apprentice has failed to meet the pass criteria.</p>	<p>Is able to demonstrate an understanding of how they analyse the challenges and purchasing motivations of typical customers.</p> <p>Is able to describe why customers buy from their organisation, using at least two examples of how their organisation's product(s) and/or services(s) satisfy common customer challenges and purchasing motivations.</p> <p>Is able to explain at least one external and one internal factor that impact their customers' purchasing decisions.</p> <p>Is able to describe what constitutes a high-quality customer experience, using evidence from customers to justify their opinion.</p>	<p>Is able to provides evidence of where they have used detailed analysis of customer challenges and purchasing motivations to successfully influence customer purchasing decisions and close sales.</p>

<p>Commercial and financial acumen</p> <p>Understand the principles of finance for sales, such as profit and loss, return on investment and budgeting. Appreciate the impacts of different types of costs on the business and the drivers of profitable performance. Understand the impact of any discount or variation in terms that you may offer.</p>		<p>Is able to describe the principles of finance for sales, profit & loss, return on investment and budgeting and provide at least two examples of how they have used their understanding of financial principles in customer conversations.</p> <p>Is able to describe at least two different types of cost on the business and how they impact profitable performance.</p> <p>Using at least two examples, is able to describe the impact of any discount or variation in terms they are permitted to offer, and how this has impacted on their personal targets, as well as the wider implication to the business as a whole.</p>	<p>Is able to provide evidence using at least two examples to demonstrate how they have applied commercial and financial principles to increase the profitability of their organisation, explaining the factors they took into account and the impact their actions made.</p>
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Grading Skill Outcomes (Work-Based Project)

Standard	Fail Criteria (the apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria.)	Pass Criteria (To achieve a pass, the apprentice must meet all of the pass criteria)	'Distinction' Criteria (To receive a distinction - 75% or more of the KSBs within the assessment method must be demonstrated at distinction, with all other KSBs demonstrated at the pass criteria).
<p>Sales planning and preparation Set effective targets using sales forecasts. Prioritise customers and activities to grow account value and maximise return-on-investment in line with your organisation's strategy. Formulate or refine customer plans and objectives. Create efficient territory plans where appropriate.</p>	<p>Apprentice has failed to meet the pass criteria.</p>	<p>Provides evidence of where they have reviewed existing sales forecasts and set targets in order to grow account value (in line with their organisation's strategy).</p> <p>Is able to describe how they review customer accounts to identify and select those they will target for growth, including reasons for their selection.</p> <p>Is able to describe principles that exist within their organisation to grow targeted customer accounts.</p> <p>Is able to provide a territory plan (or an alternative plan aligned with their organisation's planning processes), explaining how they have applied pipeline management principles in order to create their plan and prioritise customers and activities.</p>	<p>Is able to provide evidence using at least two examples of where they have developed a SMART plan of actions in order to grow customer accounts, including relevant objectives and contingency plans where actions have not been successful.</p> <p>Is able to provide evidence of where they have monitored and revaluated sales forecasts and have changed their plans as a result in order to reduce risk or maximise profit for their organisation.</p>

<p>Customer engagement</p> <p>Effectively communicate and interpret customer information exchanged through written, verbal and non-verbal communication. Develop a customer engagement style that effectively opens sales conversations, builds rapport, enhances customer relationships, and adapts to different customer's social preferences.</p>		<p>Is able to effectively interpret information communicated with customers in written, verbal and non-verbal forms. Communications responded to in an appropriate way to drive business benefits</p> <p>Is able to demonstrate a customer engagement style that effectively opens sales conversations, builds rapport, enhances customer relationships and provides value add to the customer by demonstrating appreciation of their requirements.</p> <p>Is able to outline the business objectives behind existing customer communication tools (such as brochures, presentations and proposals) and provide evidence of where they have used these tools effectively with customers.</p>	<p>Is able to provide evidence of where they have evaluated the success of different customer methods and tools used by their organisation and have recommended changes in order to increase their sales effectiveness.</p> <p>Is able to provide at least two examples of where they have adapted their customer engagement style to meet different customer's social preferences, explaining the factors they took into account and outlining what the results of their changes were.</p>
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<p>Customer needs analysis</p> <p>Be highly skilled at effective questioning and active listening techniques to understand the customer's needs, guide the sales conversation appropriately, create mutual understanding, and build trust and affinity with customers.</p>		<p>Is able to demonstrate how they use effective questioning techniques that are applicable to their product / service offering, to identify customer needs.</p> <p>Is able to describe at least two examples of questioning and listening techniques which can be used to guide the sales conversation.</p> <p>Is able to demonstrate where they have gained a mutual understanding with customers through active questioning, listening and response, including the use of techniques to ensure agreement.</p>	<p>Is able to provide evidence of where they have evaluated their questioning and listening techniques and have made changes and improvements based on their analysis, explaining the factors they took into account and the rationale behind their decisions.</p>
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<p>Propose and present solutions</p> <p>Develop sales proposals and deliver them using a presentation style and technique appropriate for your customer. Present relevant products and/or services, explain features and their advantages, and clearly articulate the value and benefit of the solution for the specific customer. Use and adapt a range of techniques to draw-out and overcome common sales objections.</p>		<p>Is able to develop a sales proposal and use appropriate presentation styles and techniques with their customers.</p> <p>Provides evidence of where they have used existing nomenclature as well as learning from sales conversations to improve their sales proposals and presentations.</p> <p>Is able to present relevant products and/or services and explain their features and advantages, adapting their presentation style (such as their use of technology versus face-to-face meetings) in order to meet audience requirements.</p> <p>Is able to demonstrate how they explain to customers the value and benefit of their proposed solution using an appropriate range of different presentation techniques.</p> <p>Is able to demonstrate where they have used and adapted a range of techniques to draw-out and overcome common sales objections, including the handling of potential objections and hidden objections.</p>	<p>Is able to provide evidence of at least two examples where they evaluated a range of potential presentation styles and techniques to select a particular approach for a customer, explaining the factors they took into account and the rationale behind their decision.</p> <p>Is able to provide evidence of where they constructively evaluated their own sales presentations and made recommendations to improve performance throughout their organisation, explaining the rationale behind their recommendations and the impact of any changes made as a result.</p>
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<p>Negotiate</p> <p>Research the customer’s likely desired outcomes and negotiating stance. Develop responses to likely objections. Identify your own organisation’s needs, such as minimum price and acceptable terms. Negotiate or trade variables effectively.</p>		<p>Is able to describe their organisation’s negotiation needs, expectations and trading variables, providing examples in relation to at least one variable of what would constitute favourable, acceptable and unacceptable terms.</p> <p>Is able to provide evidence to demonstrate where they have researched and analysed a customer’s likely negotiation stance; utilising at least three different negotiation planning and preparation techniques.</p> <p>Is able to describe how they would react to, or counter, at least two different negotiation styles, tactics or other potential sources of conflict.</p>	<p>Is able to provide evidence to demonstrate where they have successfully planned, created and negotiated a ‘win-win’ solution to achieve a successful outcome that provided mutual benefit to their customer and their organisation. This should include the factors they took into account during their planning, their rationale for the decisions they made during the negotiation, any internal recommendations they made as a result of their experience, and details of anything that their organisation now does differently as a result of their actions.</p>
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<p>Closing sales</p> <p>Be attuned to verbal and non-verbal buying-signals and move to close at an appropriate point in sales conversations. Develop ethical techniques to close sales and confirm customers' purchase agreement.</p>		<p>Is able to provide evidence, using at least two examples of how they identify verbal and non-verbal buying signals during customer conversations.</p> <p>Is able to explain the difference between ethical and unethical closing techniques.</p> <p>Is able to provide evidence, using at least two examples of how they respond to customer buying signals and use ethical techniques to close sales and confirm customers' purchase agreement or 'buy-in' at an appropriate point in the sales conversation.</p>	<p>Is able to provide evidence of where they have evaluated the closing techniques used within their organisation, explaining the factors they used to identify good and bad practices, any internal recommendations they made as a result of their evaluation, and details of anything that their organisation now does differently as a result of their actions.</p>
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<p>Gathering intelligence Collect, analyse and interpret market intelligence and share it appropriately and effectively within your organisation.</p>		<p>Is able to demonstrate how they identify and use different resources and methods to gather market intelligence from internal information (e.g. CRM, knowledge pool, intranet) and external sources (e.g. trade magazines, financial resources, websites, vertical or job role of buyer, social media).</p> <p>Is able to provide evidence of where they have analysed and interpreted market intelligence and used appropriate or correct internal process to share their findings across their organisation.</p>	<p>Is able to provide evidence of where they have evaluated the appropriateness of different resources and methods available to their organisation for gathering market intelligence, explaining the factors they took into account during their evaluation, any changes or internal recommendations that they made, and details of anything that their organisation now does differently as a result of their actions.</p>
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Grading Behaviour & Values Outcomes (Work-Based Project)

Standard	'Fail' Criteria (The apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria.)	'Pass' Criteria (To achieve a pass, the apprentice must meet all of the pass criteria)	'Distinction' Criteria (To receive a distinction - 75% or more of the KSBs within the assessment method must be demonstrated at distinction, with all other KSBs demonstrated at the pass criteria).
<p>Proactivity</p> <p>Proactively develop new and existing customer relationships. Plan and lead sales conversations and make recommendations to support the customers' requirements. Proactively monitor the customer experience.</p>		<p>Provide evidence of where they have proactively developed new customer and existing customer relationships, highlighting the activities that made their actions proactive as opposed to reactive, and explaining what 'good proactivity' looks like within their organisation.</p> <p>Is able to demonstrate their ability to plan and lead sales conversations, and proactively make recommendations to support customer requirements.</p> <p>Is able to identify and appropriately use existing internal processes to monitor customer experiences.</p>	<p>Is able to provide evidence of where they evaluated their and their team's ability to monitor the customer experience and create feedback loops to improve the service they and they organisation delivers, explaining any recommendations they made about how processes and practices could be improved in this area, and anything that their organisation now does differently as a result.</p>

Appendix 2.2: Sales Executive Apprenticeship Grading Criteria (Presentation)

Grading Knowledge Outcomes (Presentation)

Standard	'Fail' Criteria (The apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria.)	'Pass' Criteria (To achieve a pass, the apprentice must meet all of the pass criteria)	'Distinction' Criteria (To receive a distinction - 75% or more of the KSBs within the assessment method must be demonstrated at distinction, with all other KSBs demonstrated at the pass criteria).
<p>Organisational knowledge</p> <p>Understand your organisation's vision, values and capabilities, the principal goals of its overall strategy, and the specific objectives of its marketing and sales strategies. Know how to analyse your organisation's sales and marketing strategies and objectives and translate them into plans and actions for your role.</p>	<p>Apprentice has failed to meet the pass criteria.</p>	<p>Is able to describe their organisation's vision, values and capabilities.</p> <p>Is able to summarise the key principles and objectives of their organisation's marketing and sales strategies, referencing internal documentation and internal resources where appropriate.</p> <p>Is able to demonstrate how their plans and actions are in line with their organisation's sales strategies, objectives and processes.</p> <p>Is able to describe how their role within the organisation contributes to their organisation's wider marketing and sales strategies.</p>	<p>Is able to provide one or more example of where they have analysed their organisation's vision and values, and marketing and sales strategies, and have made recommendations of how this information may be better utilised as part of their role, explaining the rationale behind their recommendations and anything that their organisation now does differently as a result of their actions.</p> <p>Is able to provide one of more example of where they applied their understanding of their organisation's vision and values, and marketing and sales strategies to update existing plans and actions or establish new plans and actions for their role, explaining the rationale behind their decisions and anything that their organisation now does differently as a result of their actions.</p>

<p>Product, service and sector knowledge</p> <p>Identify the features and advantages of the product(s) and/or services(s) you sell, understand how these meet customer needs, and examine how they compare to competitor's solutions. Understand the nature of your sector and the likely forthcoming changes to it. Understand the legal, regulatory and ethical frameworks relating to your sector and role.</p>		<p>Is able to describe the features and advantages of their organisation's product(s) and/or services(s) and how these meet the needs of their customers.</p> <p>Is able to demonstrate how they compare their organisation's product(s) and/or service(s) to competitors' solutions, identifying where they can positively differentiate their product(s) and/or service(s) in sales conversations.</p> <p>Is able to describe the legal, regulatory and ethical frameworks relating to their sector and role, identifying key legal and regulatory elements that are applicable and how they adhere to them.</p> <p>Is able to outline how they and their organisation demonstrates compliance with relevant data protection guidelines, identifying how they adhere and keep up to date with them.</p>	<p>Can provide one or more example of where they have evaluated their comparison of their organisation's product(s) and/or service(s) versus competitors' solutions and have made recommendations about how they and/or their organisation can use the findings to their advantage, explaining the rationale behind their recommendations and anything that their organisation now does differently as a result of their actions.</p> <p>Is able to detail how legal, regulatory and ethical requirements impact upon their sector and role and explain what the implications of not adhering to these requirements could be.</p>
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<p>Market knowledge Understand how your market is segmented and how to target specific segments through effective product or service positioning.</p>		<p>Is able to outline how their market may be segmented, including considering whether vertical, horizontal and/or geographic segmentation is appropriate.</p> <p>Is able to describe how their organisation's products and/or services are or may be positioned to best target specific market segments.</p> <p>Is able to describe how different strategies are or may be used to engage customers in different market segments.</p>	<p>Discusses where they have completed market segmentation analysis and have made recommendations about how they and/or their organisation can use the findings to their advantage, explaining the rationale behind their recommendations and anything that their organisation now does differently as a result of their actions.</p>
<p>Digital Knowledge Understand how to exploit digital technologies to aid the sales cycle.</p>		<p>Is able to describe the digital technologies currently available within their organisation to help aid the sales cycle, and how internal resources such as CRM systems and external resources such as social media are currently used for lead generation.</p>	<p>Discusses where they have evaluated the appropriateness and effectiveness of digital tools and technologies currently in use and potentially available to their organisation and have made recommendations about which tools and technologies could be used to increase sales effectiveness, explaining the rationale behind their recommendations and anything that their organisation now does differently as a result of their actions.</p>

Appendix 2.3: Sales Executive Apprenticeship Grading Criteria (Professional Discussion)

Grading Skill Outcomes (Professional Discussion)

Standard	Fail Criteria (The apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria.)	Pass Criteria (To achieve a pass, the apprentice must meet all of the pass criteria)	'Distinction' Criteria (To receive a distinction - 75% or more of the KSBs within the assessment method must be demonstrated at distinction, with all other KSBs demonstrated at the pass criteria).
<p>Continuous professional development</p> <p>Respond positively to coaching, guidance or instruction; demonstrate awareness and ownership of your continual professional development, and actively seek out development opportunities outside of formal learning situations.</p>	<p>Apprentice has failed to meet the pass criteria.</p>	<p>Is able to provide evidence using at least two examples to demonstrate where they have received and have responded positively to coaching, guidance or instruction.</p> <p>Is able to provide evidence to demonstrate where they have worked with internal management to identify their sales strengths and weaknesses and have planned their continual professional development accordingly.</p> <p>Is able to provide evidence to demonstrate they have actively sought out development opportunities outside of formal learning situations.</p>	<p>Is able to justify, using at least two examples, why they chose specific professional development opportunities, what the results have been and what recommendations they would make to others in similar situations.</p>

<p>Time Management Use and adapt appropriate tools and techniques to prioritise and manage your time effectively.</p>	<p>Apprentice has failed to meet the pass criteria.</p>	<p>Is able to provide evidence to demonstrate where they have used appropriate tools and techniques to effectively plan and manage their time.</p>	<p>Discusses where they have used a new time management tool or technique or have modified or adapted an existing time management tool or technique to better meet the needs of their role and organisation, explaining the rationale behind their decision and the impact of the changes they made.</p>
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<p>Collaboration and team-work</p> <p>Contribute effectively within a team environment. Work collaboratively with both internal and external stakeholders. Manage communications with the cross-functional team in relation to the effective delivery of your sales, such as finance and service delivery. Support continual business improvement by sharing best practice with sales team colleagues and assist the marketing team to develop new marketing collateral.</p>		<p>Is able to demonstrate how they effectively contribute within their team environment.</p> <p>Is able to provide evidence of where they have worked collaboratively with internal and external stakeholders, detailing the differences in the way they work with their direct team, with other teams within their organisation, with customers, and with any other relevant third parties.</p> <p>Is able to manage communications with the cross-functional team in relation to the effective delivery of their sales, and describe which teams or departments have significant impact on their role and their customers, and who the key personnel are.</p> <p>Is able to provide evidence of where they have supported continual business improvement by sharing best practice with sales team colleagues and applicable business units.</p>	<p>Is able to evaluate how effective collaboration and teamwork can benefit the individual, the team and the organisation.</p> <p>Is able to discuss where they have analysed the existing level of teamwork and collaboration within their organisation and its impact on their role and the delivery of sales, explaining any improvement recommendations they have made, the rationale behind their recommendations and anything that their organisation now does differently as a result of their actions.</p>
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<p>Customer experience management</p> <p>Deliver a positive customer experience. Manage customer enquiries and issues effectively. Take proactive action to prevent and minimise customer concerns and complaints. Handle all customer interactions professionally to the customer's satisfaction.</p>		<p>Is able to demonstrate the steps they take to proactively deliver a positive customer experience, and how these connect to the wider expectations of their organisation.</p> <p>Is able to provide evidence of when they have proactively prevented and minimised customer concerns and complaints in a professional fashion by resolving potential areas of concern before a complaint arises.</p>	<p>Is able to provide evidence of where they have evaluated the sales and after-sales experience of their customers and demonstrate how they have modified their actions as a result of their findings to deliver an improved customer experience.</p>
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<p>Digital skills</p> <p>Effectively use digital tools to conduct research and target customers in line with the overall sales strategy. Able to deliver presentations and meetings using digital communication. Complete accurate records and process sales in accordance with your organisation's policies, procedures and digital CRM systems.</p>		<p>Is able to use digital tools to conduct research and target customers, including the use of primary research tools such as internal CRM and sales data analysis systems, and secondary research tools such as social media and internet search engines.</p> <p>Is able to demonstrate the ability to deliver presentations and/or meetings using digital communication tools that are applicable to your organisation's product(s) and/or service(s), customers and sales processes, such as video conferencing tools, screenshare tools, or interactive digital presentations.</p> <p>Is able to complete accurate records and process sales in accordance with their organisation's policies, procedures and digital CRM systems.</p>	<p>Is able to provide evidence of where they have evaluated the appropriateness and effectiveness of digital tools and technologies currently in use and potentially available to their organisation and have made recommendations about how these tools and technologies should be used to increase sales effectiveness, explaining the rationale behind their recommendations and anything that their organisation now does differently as a result of their actions.</p>
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Grading Behaviour & Values Outcomes (Professional Discussion)

Standard	'Fail' Criteria (The apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria.)	'Pass' Criteria (To achieve a pass, the apprentice must meet all of the pass criteria)	'Distinction' Criteria (To receive a distinction - 75% or more of the KSBs within the assessment method must be demonstrated at distinction, with all other KSBs demonstrated at the pass criteria).
<p>Ethics and integrity</p> <p>Present yourself as an ambassador for your employer's brand, and act in accordance with your organisation's values and code of conduct at all times. Maintain integrity in all business relationships. Challenge unethical behaviour.</p>	<p>Apprentice has failed to meet the pass criteria.</p>	<p>Is able to provide evidence of where they have acted as an ambassador for their employer's brand, detailing what this entailed and the behaviours that were demonstrated.</p> <p>Is able to describe the main principles of their organisation's values and code(s) of conduct, and describe the actions and behaviours that need to be demonstrated to comply with these.</p> <p>Is able to demonstrate integrity in all business relationships and describe what integrity is against an ethical code for sales.</p>	<p>Is able to provide evidence of where they have examined how your organisation's values and codes of conduct meet ethical and social requirements and explain what impact not meeting those requirements could have on them as an individual and on their organisation as a whole.</p>

<p>Self-discipline</p> <p>Demonstrate the ability to control your actions, reactions and emotions. Remain calm under pressure and be aware of your personal impact on others.</p>		<p>Is able to provide evidence using at least two examples to demonstrate their ability to control their actions, reactions and emotions.</p> <p>Is able to provide evidence using at least two examples to demonstrate their ability to remain calm under pressure.</p> <p>Is able to assess their personal impact on others, identifying their relevant personality traits and explaining how others may react to them.</p>	<p>Is able to outline the importance of controlling their actions, reactions and emotions and remaining calm under pressure in their role, assess their ability in these areas and explain their rationale for their assessment, set relevant personal improvement goals and explain strategies and tactics to achieve them.</p>
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<p>Resilience and self-motivation</p> <p>Demonstrate the ability to maintain optimism and professionalism in the face of rejection, quickly recover from setbacks, adapt well to change, and keep going in the face of adversity. Remain highly motivated to achieve both personal and professional goals.</p>		<p>Is able to describe approaches to maintain optimism and professionalism in the face of rejection and quickly recover from setbacks and provide evidence using at least two examples to demonstrate where they have successfully applied these techniques.</p> <p>Is able to describe what is required to adapt well and keep going during periods of change and adversity, and where applicable provide evidence using at least one example to demonstrate their abilities in this area.</p> <p>Provide evidence of where they have set and achieved personal and professional goals, describing the techniques they used to remain highly motivated to do so.</p>	<p>Is able to outline the importance of maintaining optimism and professionalism in the face of rejection and quickly recovering from setbacks, assess their ability in this area and explain their rationale for their assessment, set relevant personal improvement goals and explain strategies and tactics to achieve them.</p>
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