End-Point Assessment

Sales Executive Level 4 (V1.1)

Support Pack

CONTENTS

INTRODUCTION

This document sets out the requirements, advice, and guidance for the End-Point Assessment (EPA) of the Sales Executive Level 4 apprenticeship standard. This document is designed for apprentices, employers and trainers involved within the End-Point Assessment of an apprentice studying the Sales Executive Level 4 Standard.

An apprentice for the Sales Executive Level 4 standard is typically 18 months of learning prior to End-Point Assessment.

This document is divided into sections covering all the relevant aspects of EPA for Level 4 Sales Executive.

Should you require any further information other than the guidance in this document, do not hesitate to contact *admin@nqual.co.uk*

Within this guide you will find references to End-Point Assessments. This information has been outlined in the Institute for Apprenticeships and Technical Education, Sales Executive Level 4 Assessment Plan. For reference, you can find this document using the link below:

Sales Executive L4 EPA Plan (instituteforapprenticeships.org)

EPA TIMESCALE

Register with NQual

Training Providers should register apprentices for EPA with NQual a minimum of 90 days before assessment. Providers will pay a registration fee of £30.

Gateway

This is when the employer, apprentice and training provider confirm that the apprentice is ready for End-Point Assessment. All evidence should be uploaded to NQual a maximum of 10 weeks prior to EPA.

EPA Booking

The training provider should complete the booking section on the Gateway form or training providers can arrange the booking via ACE360. NQual will confirm booking within 48 hours.

EPA Approved

NQual will send an invoice for the remaining fee once EPA is approved.

Assessment

The apprentice will complete a Work-Based Project, Presentation Including Sales Pitch and Q&A, and a Professional Discussion Supported by a Portfolio of Evidence.

Results

Results will be communicated within 10 working days of final assessment. If the apprentice passes, NQual will send details to the apprentice and training provider containing an EPA results document. If the apprentice fails, NQual will send details to the learner and training provider outlining feedback and next stages.

GATEWAY

This section outlines the requirements apprentices must have met in order to complete their End-Point Assessment.

Once the employer is fully satisfied that the apprentice has the knowledge, skills and behaviours set out within this standard, the employer can formally confirm that the apprentice is ready for EPA via Gateway.

Gateway requirements for Sales Executive Level 4 outline the apprentice must have:

- Evidence of achieving relevant maths and English qualifications if required by funding regulations or the employer
- Apprentice must submit a Portfolio of Evidence
- Submit Gateway Document which includes confirmation of Work-Based Project title (from list provided by NQual)

The Gateway form must be sent to NQual a minimum of 6 weeks before End-Point Assessment is carried out, along with the Portfolio of Evidence. NQual will accept submission of Work-Based Project a minimum of 4 weeks from Gateway acceptance and a maximum of 10 weeks. A further 2 weeks is needed for the Independent Assessor to review and mark to ensure this component has been passed before you complete the other two assessment methods.

You can access the NQual Gateway Form by emailing: *admin@nqual.co.uk*

PORTFOLIO OF EVIDENCE

As part of the apprenticeship, apprentices are required to prepare a Portfolio of Evidence which will be developed on programme to demonstrate their practice in achieving the knowledge, skills and behaviours (KSBs) associated with the Professional Discussion.

The on-programme portfolio that will inform the Professional Discussion might include individual learning and development plans, witness testimonies, written reports, sales pitches, client feedback and training logs (*please note that this is not an exhaustive list). Reflective accounts are not permissible as evidence.

The portfolio is required to be made available to the assessor in an electronic format at Gateway to ensure the Independent Assessor has sufficient time to review the portfolio and build supporting questions for the Professional Discussion. NQual will not assess the Portfolio of Evidence directly as it underpins the interview. They are not required to provide feedback after this review.

The portfolio can be used during the Professional Discussion in the form of either a hard copy/printout or digitally. If the apprentice wishes to use a digital version, they will be asked to share their screen if the assessment is being conducted remotely. This will allow the assessor to confirm the authenticity of the assessment and that no pre-agreed materials are being accessed during the live assessment.

The apprentice must submit any policies and procedures as requested by NQual.

COMPONENTS OF END-POINT ASSESSMENT

The End-Point Assessment for Sales Executive Level 4 includes 3 assessment methods. These are a Work-Based Project, a Presentation Including a Sales Pitch with Q&A, and a Professional Discussion Supported by Portfolio of Evidence. All components are outlined within this support pack in further detail.

Work-Based Project

The Work-Based Project will be based on work the apprentice has carried out after the Gateway. NQual 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 research and written project report must start after the apprentice has gone through the Gateway.

The topic selected must be agreed by both NQual and the employer before the Work-Based Project start date. A template will then be provided by NQual 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.

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 successfully passed this component of the End-Point Assessment.

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 the apprentice's 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 the Assessment Plan.

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- Appendix: Cross-referencing to the KSBs identified in the Assessment Plan.

This component must be passed first before an apprentice is able to continue with the other components of their End-Point Assessment. As a result, apprentices will need to submit their project 2 weeks prior to their other EPA components.

Presentation Including Sales Pitch and Q&A

A copy of the presentation must be sent to NQual 2 weeks before the associated component takes place. The presentation should be 30 minutes in length and will consist of the following:

- 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 the apprentice has prepared for a sales pitch.
- A 15-minute question and answer session around specific points that the independent assessor wishes to explore with you in relation to your pitch and pitch explanation.

Prior to the presentation and questioning, the independent assessor will 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 presentation must be delivered verbally, either face-to-face or via video conference, and may also include reference to physical material or digital content. **Guidance on what should be included within the Presentation is provided further on in this Support pack.**

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, and behaviour requirements of this standard, validating the assessment of the criteria laid out in the Assessment Plan.

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 independent assessor in line with the Assessment Plan.
- Apprentices 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 the Assessment Plan.

- A 25-minute discussion around specific points that the independent assessor wishes to explore with the apprentice that apply to the KSBs for this assessment method: what they did, what they have learned, 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 may be conducted face-to-face or via an online platform, e.g. video conferencing. 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.

END-POINT ASSESSMENT METHODS TABLE

The below highlights criteria that will be covered in each assessment component. Please review these details as it will provide guidance on what will be covered in each assessment component.

Learning Outcomes	What is Required	Work-Based Project	Presentation Including Sales Pitch and Q&A	Professional Discussion Underpinned by a Portfolio of Evidence
Knowledge				
Customer Knowledge	Know how to analyse the macro and microenvironment 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.	✓		
Commercial and Financial Acumen	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.	✓		
Organisational Knowledge	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.		✓	

Product, Service and Sector Knowledge	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.		✓	
Market Knowledge	Understand how your market is segmented and how to target specific segments through effective product or service positioning.		✓	
Digital Knowledge	Understand how to exploit digital technologies to aid the sales cycle.		✓	
Skills				
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.	✓		
Customer Engagement	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.	✓		
Customer Needs Analysis	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.	✓		
Propose and Present Solutions	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.	✓		

Negotiate	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.	✓		
Closing Sales	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.	✓		
Gathering Intelligence	Collect, analyse, and interpret market intelligence and share it appropriately and effectively within your organisation.	✓		
Time Management	Use and adapt appropriate tools and techniques to prioritise and manage your time effectively.			✓
Collaboration and Team-Work	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.			✓
Customer Experience Management	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.			✓
Digital Skills	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.			✓

Behaviours				
Proactivity	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.	✓		
Ethics and Integrity	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.			✓
Self-Discipline	Demonstrate the ability to control your actions, reactions, and emotions. Remain calm under pressure and be aware of your personal impact on others.			✓
Resilience and Self-Motivation	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.			✓
Continuous Professional Development	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.			✓

GRADING & CRITERIA

Assessments contained within this plan will result in the apprentice achieving a Fail, Pass or Distinction. This decision is dependent on whether they have met the standard and its End-Point Assessment criteria.

In order to achieve a Passing grade, the apprentice must gain a minimum of a Pass in all components of the End-Point Assessment. To achieve a Distinction, the apprentice must achieve all Pass criteria and 75% or more of the Distinction criteria.

Grading results will be communicated to the apprentice within 10 working days of completion of the final component.

Assessment Breakdown

A summary table of the overall grading can be found below:

Assessment Methods 1: Work-Based Project	Assessment Methods 2: Presentation Including Sales Pitch and Q&A	Assessment Methods 2: Professional Discussion Supported by a Portfolio of Evidence	Overall Grading
Fail	Any Grade	Any Grade	Fail
Any Grade	Any Grade	Fail	Fail
Any Grade	Fail	Any Grade	Fail
Pass	Pass / Distinction	Pass / Distinction	Pass
Pass / Distinction	Pass / Distinction	Pass	Pass
Pass / Distinction	Pass	Pass / Distinction	Pass
Distinction	Distinction	Distinction	Distinction

The Pass and Distinction descriptors can be found in the tables below separated into Work-Based Project, Presentation Including Sales Pitch and Q&A, and Professional Discussion Supported by a Portfolio of Evidence.

Grading Descriptors for Work-Based Project

Learning Outcomes	Pass Descriptors	Distinction Descriptors	Guidance Notes
Customer Knowledge	Is able to demonstrate an understanding of how they analyse the challenges and purchasing motivations of typical customers. 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. Is able to explain at least one external and one internal factor that impacts their customers' purchasing decisions. Is able to describe what constitutes a high-quality customer experience, using evidence from customers to justify their opinion.	Is able to provide evidence of where they have used detailed analysis of customer challenges and purchasing motivations to successfully influence customer purchasing decisions and close sales.	Clear understanding and analysis of the type of customer who purchases from their organisation and internal and external factors, with examples, as to how this impact their purchasing decisions. Awareness around understanding purchasing motivations, tailored sales approaches, building relationships, and demonstration of expertise. A clear understanding of the difference between internal and external factors. Supporting examples throughout of "real life" practice to demonstrate/justify opinion.
Commercial and Financial Acumen	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. Is able to describe at least two different types of cost on the business and how they impact profitable performance. Using at least two examples, is able to describe the impact of any discount or variation in terms	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.	

	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.		
Sales Planning and Preparation	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). Is able to describe how they review customer accounts to identify and select those they will target for growth, including reasons for their selection. Is able to describe principles that exist within their organisation to grow targeted customer accounts. 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.	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. 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.	
Customer Engagement	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. 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.	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. 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.	

	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.		
Customer Needs Analysis	Is able to demonstrate how they use effective questioning techniques that are applicable to their product / service offering, to identify customer needs. Is able to describe at least two examples of questioning and listening techniques which can be used to guide the sales conversation. 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.	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.	
Propose and Present Solutions	Is able to develop a sales proposal and use appropriate presentation styles and techniques with their customers. Provides evidence of where they have used existing nomenclature as well as learning from sales conversations to improve their sales proposals and presentations. 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. Is able to demonstrate how they explain to customers the value and benefit of their	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. 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.	Clear examples are provided as to how the sales proposal and presentation is fit for purpose and clearly demonstrates findings. Examples of feedback and how this has been taken on board to make future improvements Critical analysis of **at least 2** presentation methods with considerations with justification of their chosen approach and how this suited the audience. Modified objection-handling techniques based on the client's communication style and preferences and the approach taken.

	proposed solution using an appropriate range of different presentation techniques. 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.		How they employed a consultative approach, collaborating with the client to find mutually beneficial solutions to potential obstacles.
Negotiate	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. 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. Is able to describe how they would react to, or counter, at least two different negotiation styles, tactics or other potential sources of conflict.	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.	
Closing Sales	Is able to provide evidence, using at least two examples of how they identify verbal and non-verbal buying signals during customer conversations. Is able to explain the difference between ethical and unethical closing techniques. Is able to provide evidence, using at least two examples of how they respond to customer	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.	

	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.		
Gathering Intelligence	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). 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.	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.	Ability to clearly explain and differentiate between both internal and external methods of gathering market intelligence with examples of what methods are used within their role/organisation or sector. Advantages or limitations of their chosen approach. Any considerations or improvements to the business's current approach and the overall impact this would have on performance or findings.
Proactivity	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. Is able to demonstrate their ability to plan and lead sales conversations, and proactively make recommendations to support customer requirements. Is able to identify and appropriately use existing internal processes to monitor customer experiences.	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 the 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.	

Grading Descriptors for Presentation Including Sales Pitch and Q&A

Learning Outcomes	Pass Descriptors	Distinction Descriptors	Guidance Notes
Organisational Knowledge	Is able to describe their organisation's vision, values and capabilities. 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. Is able to demonstrate how their plans and actions are in line with their organisation's sales strategies, objectives and processes. Is able to describe how their role within the organisation contributes to their organisation's wider marketing and sales strategies.	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. 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.	
Product, Service and Sector Knowledge	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. 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.	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.	

	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. 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.	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.	
Market Knowledge	Is able to outline how their market may be segmented, including considering whether vertical, horizontal and/or geographic segmentation is appropriate. Is able to describe how their organisation's products and/or services are or may be positioned to best target specific market segments. Is able to describe how different strategies are or may be used to engage customers in different market segments.	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.	Ability to clearly demonstrate the difference between vertical, horizontal and geographic segmentation and which is applicable within their organisation / sector. **Geographic** – Region, urban vs rural and climate zones. **Vertical** – customised offerings and industry specific challenges **Horizontal** – Age, gender, income, occupation, lifestyle, and hobbies. Awareness around cross-segmentation, psychographic segmentation and the need to ensure this is continuously monitored whilst making adjustments where applicable.
Digital Knowledge	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.	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	Specific examples of digital technologies used within their role and the benefits and limitations of each (at least two to compare) Awareness of the different stages of the sales lifecycle and how digital technologies used

		effectiveness, explaining the rationale behind their recommendations and anything that their organisation now does differently as a result of their actions.	positively impacts the sales process. The importance of market intelligence and how it helps to support in understanding market position, evaluation of product, target audience and competitor analysis.

Grading Descriptors for Professional Discussion Supported by a Portfolio of Evidence

Learning Outcomes	Pass Descriptors	Distinction Descriptors	Guidance Notes
Continuous Professional Development	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. 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. Is able to provide evidence to demonstrate they have actively sought out development opportunities outside of formal learning situations.	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.	

Time Management	Is able to provide evidence to demonstrate where they have used appropriate tools and techniques to effectively plan and manage their time.	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.	Specific time management tools / techniques / models or strategies identified or developed and the impact this has on their time management and productivity.
Collaboration and Team- Work	Is able to demonstrate how they effectively contribute within their team environment. 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. 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. 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.	Is able to evaluate how effective collaboration and teamwork can benefit the individual, the team and the organisation. 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.	
Customer Experience Management	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.	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	

	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.	findings to deliver an improved customer experience.	
Digital Skills	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. 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. Is able to complete accurate records and process sales in accordance with their organisation's policies, procedures and digital CRM systems.	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.	Clear understanding and examples provided of both primary and secondary research methods used within their role. Advantages and limitations of each discussed (**minimum 2**) with potential as to what other mediums could be used to improve overall business performance. Awareness around the benefits these bring to the organisation such as alignment of business goals, user-friendliness, accessibility, integration and cost-effectiveness could be considered.
Ethics and Integrity	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. 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.	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.	

	Is able to demonstrate integrity in all business relationships and describe what integrity is against an ethical code for sales.		
Self-Discipline	Is able to provide evidence using at least two examples to demonstrate their ability to control their actions, reactions and emotions. Is able to provide evidence using at least two examples to demonstrate their ability to remain calm under pressure. Is able to assess their personal impact on others, identifying their relevant personality traits and explaining how others may react to them.	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.	
Resilience and Self-Motivation	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. 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. 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.	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.	Provide defined examples as to how they ensure professionalism and optimism and how this supports with their professional development both personally and professionally. Maintaining a positive mindset, building resilience, continuous learning, networking and maintaining professionalism should be considered.

Re-sit / Re-take

If an apprentice Fails one or more component, they will be offered the opportunity to re-sit / re-take the component(s). It is then up to the apprentice's employer how many attempts an apprentice is given.

The timescale for a re-sit typically takes 1 month and a re-take 3 months (dependent on how much re-training is required). All assessment methods must be taken within a 6-month period, otherwise the entire EPA will need to be resat / retaken.

Where any assessment method must be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of Pass. Re-sits and re-takes are not offered to an apprentice wishing to move from Pass to a higher grade.

PORTFOLIO GUIDANCE

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.

Evidence Sources May Include:

- Individual learning and development plans
- Witness testimonies
- Written reports
- Sales pitches
- Client feedback
- Training logs
- Personal development Plans / CPD Logs and examples of learning development / training.
- Evidence / screenshot examples as to where they have worked collaboratively with various stakeholders

- Evidence / screenshot examples as to where they have shared best practice with other colleagues
- Business SWOT and PESTLE analysis
- Examples as to where they have dealt with customer queries in a proactive and effective manner
- Examples / screenshots of online digital / CRM systems used.
- GDPR policies / annotated images of internal procedures/policies demonstrating how accurate records are collated.
- Examples of when the learner has acted as an ambassador for their role / company.
- Employee Handbook screenshots - documented with examples of when KSBs have been demonstrated within the workplace
- Effective methods as to how workload is managed e.g. screenshots of Outlook calendar, diary screenshots, meeting notes/minutes or brief explanation as to how work is delegated to other colleagues.

Reflective accounts are not permissible as evidence. The portfolio is required to be submitted at Gateway to ensure there is sufficient time for assessor review prior to End-Point Assessment taking place.

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