

# ASSESSMENT PLAN

## Business to Business (B2B) Sales Professional Level 6 Integrated Degree Apprenticeship

### 1. Introduction

The objective of the B2B Sales Professional apprenticeship is to develop B2B Sales Professionals across all industry sectors, who will deliver value to their customers and their own organisation's whilst demonstrating strong ethical practice. It is an '**integrated degree apprenticeship**' in that it has been designed to fully integrate a Higher Education Institute (HEI) validated degree that leads to workplace occupational competency as a B2B Sale Professional.

The assessment approach within the degree has been designed to ensure that apprentices meet the skills, knowledge and behaviour outcomes as defined in the Apprenticeship Standard, whichever HEI is delivering the programme. It has also been designed to be:

1. Flexible - appropriate, relevant and feasible for all apprentices/employers across a wide range of employment contexts
2. Consistent - Provide a consistent approach to the assessment of the knowledge, skills and behaviours required by the Apprenticeship Standard to provide employers with confidence of the equivalence of the standard achieved
3. Viable – an affordable and manageable approach to delivering 'end-point assessment' (EPA) based on the number of potential learners.

The achievement of the degree acts as a verification that the standard has been met by the apprentice and this will be assessed through a comprehensive EPA undertaken in the final stage of the degree. The EPA will be comprised of two components: a final Work Based Project assessment and a Panel Interview.

As an integrated apprenticeship, the HEI will be required to be listed on both the Register of Apprenticeship Training Providers (RoATP) and the Register of End-point Assessment Organisations (RoEPAO) to be able to deliver the apprenticeship training and then conduct the integrated end-point assessment. The awarding HEI will be responsible for both the on-programme and EPA requirements of the apprenticeship.

In addition, HEIs meet the rigorous quality assurance standards that are set, monitored and upheld by the Quality Assurance Agency for Higher Education (QAA). They have robust and respected assessment processes and quality assurance that incorporates internal moderation and external examiners to ensure the independence of the assessment process across the degree.

This apprenticeship is distinguished by the blend of employer defined skills, knowledge and behaviour outcomes that are integrated and assessed as part of the degree with professional recognition by the Association of Professional Sales (APS).

The integrated degree apprenticeship will typically take 3 years to complete with the EPA taken in the last six months. This plan details the on-programme and EPA requirements. It will be of interest to apprentices, employers and HEIs.

## 2. Apprenticeship Structure

The degree apprenticeship must consist of 360 credits at level 6, typically 120 credits for each calendar year of the three year Programme. The 360 credits will include both on-programme assessment and EPA and the EPA will be equivalent to 40 credits of the total credits awarded.

HEIs will design on-programme training and assessment to develop the knowledge, skills and behaviours required in the published Standard and to ensure that apprentices are appropriately prepared to undertake the EPA and perform the role of a B2B Sales Professional. Both the completion of the apprenticeship and the degree programme will require passing the EPA. The EPA must be incorporated into the final module or stage of the degree programme.

Each HEI will develop its own programme structure to develop the skills, knowledge and behaviours required of the apprenticeship standard and the assessment methods outlined in this plan.

On-programme delivery will:

- Be constructed to maximise the benefit from work-based and online learning
- Provide time for learners to study and reflect on their learning
- Deliver a clearly structured programme where achievements are built up and progress is transparent
- Reflect the way in which the skills and knowledge are used professionally in the role of a B2B Sales Professional, ensuring that knowledge and skills are developed and supported logically

## 3. Assessment Overview

Each HEI will develop and validate its own degree programme and will map the individual modules to the outcomes in the apprenticeship standard. Individual modules will include formative and summative assessment of the skills, knowledge and behaviour outcomes en-route to the final EPA. The apprentice will be required to keep and develop a Learning Journal of evidence of their professional development and this will also be referenced as evidence during the Panel Interview component of the EPA. The Work Based Project is required to be a substantial piece of work undertaken after the EPA gateway and within the last six months of the apprenticeship.

The blend of proposed on-programme formative and summative assessment leading to the EPA is shown in figure 1 overleaf.

## 4. Assessment Methods

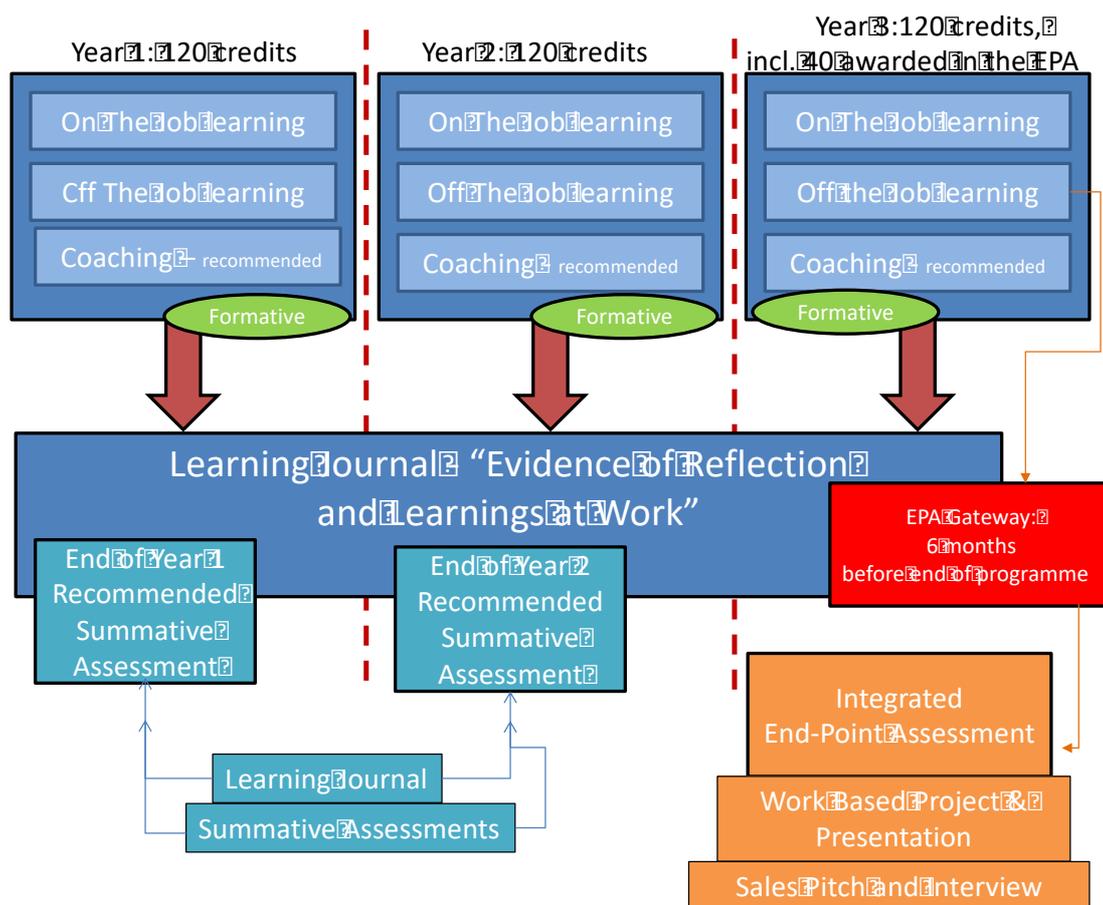
The assessment strategy of the integrated degree apprenticeship includes on-programme formative and summative assessments for each programme module, end of year/stage summative assessments and an integrated EPA.

On-programme assessment will:

- Relate to B2B Sales practice
- Provide opportunities for apprentices to critically reflect on their own professional practice
- Include formative and summative assessment feedback for programme modules

A mandated on-programme activity is the development of a Learning Journal showing evidence of reflection of learning. Review of the Learning Journal will be included as part of the Panel Interview component within the EPA and used to confirm competence against the standard.

Other formative assessment methods are not mandated in this assessment plan but typically will be applied to the modules proposed by each HEI to assess the development of knowledge, skills and behaviours (KSBs) required by the standard. These will only take place on-programme.



**Figure 1: Illustration of the Assessment blend of the Programme**

The HEI and employer will support the apprentice and provide extra guidance where performance issues might arise to ensure that the apprentice is fully supported in meeting the outcomes of the standard. The approach draws upon the established good practice already undertaken in HEIs, but with the advantage of employer support and the workplace context to help apprentices see the real-world application of their skills, knowledge and behaviours on an ongoing basis. The HEI's are responsible for ensuring that all assignments that contribute to module assessments are examined in a consistent way and that the judgments reached are comparable and reliable.

End of year/stage summative assessments will take place as part of the degree assessment and the forms of these may vary by HEI and will be managed by the HEI. The year 2 summative assessment

will be graded up to 30% of the overall degree assessment. The on-programme assessment methods will contribute to the preparedness of apprentices to undertake EPA.

The integrated EPA will be comprised of a final Work Based Project and Presentation and a Sales Pitch and Panel Interview.

## 5. Learning Journal

On-programme learning will include the requirement to produce a 'Learning Journal', to help integrate the on-the job and off-the job learning. The Learning Journal is a collection of work based evidence that demonstrates the skills, knowledge and behaviours that the apprentice has acquired against the standard, how learning has been applied and their achievements and capabilities. It is also a mandatory component of the EPA and will help to confirm competence against the standard during the Panel Interview component of the EPA.

The minimum requirements of the Learning Journal include a weekly update by the apprentice. The Learning Journal will be provided by the HEI and updates will include reference to the development of the Knowledge, Skills and Behaviours of relevance to the week's work activities. For example, this may include a summary of market or customer research activity, written evidence of support in a pitch or contribution to the development of a proposal. A documented, on-programme, monthly progress review with the Coach / Line Manager is recommended.

Review of the Learning Journal will be included as part of the Panel Interview process within the EPA and used to confirm competence against the standard but it will not be assessed 'on-programme'.

## 6. End-Point Assessment Gateway

The gateway to being able to take the integrated EPA is:

- Completion of the programme modules within the Bachelor's degree (Hons) in Business to Business Sales.
- Successful completion of the module assessments
- Completion of the Learning Journal
- Achievement of English and mathematics at level 2 if not achieved prior to the apprenticeship. 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 British Sign Language qualification are an alternative to English qualifications for whom this is their primary language.
- Pitching to a customer will be observed by the apprentice's line manager and review of the apprentice's pitching skills will be part of their EPA gateway decision, thereby confirming their competence at pitching and converting a sale. As it is part of the gateway process it is a component of the on-programme assessment.
- Confirmation from the employer that the apprentice is ready. It is recommended that the HEI is consulted by the employer to validate the decision.

## 7. End-Point Assessment

The end-point assessment is specifically designed to test the professional competence of the apprentice to undertake the B2B Sales Professional job role and the assessment approach will cover all the Knowledge, Skills and Behaviours defined in the standard.

The assessment methods for the EPA will comprise of the following two components:

- (i) A Work Based Project with presentation completed over a period of 6 months.
- (ii) A Panel Interview comprising a Sales Pitch followed by an interview which will be supported by the Learning Journal.

The Work based Project will need to be passed before the Panel Interview can take place.

The combination of the Work Based Project and Presentation and a Sales Pitch and Panel Interview will fully test that the apprentice meets all requirements of the standard. The EPA components will be assessed using the grading approach described in section 8. The two components will have equal weighting in the EPA and the grades will be aggregated to determine the final EPA grade.

Guidance for where the Knowledge, Skills and Behaviours should be evidenced in the different components of the EPA are listed in the Occupational Brief in Appendix 1.

### 7.1 Work Based Project.

This is the first component of the EPA and will be a contextualised work based project of 6000 words with a 10-minute presentation covering all the relevant activities of a B2B Sales Professional which will demonstrate enhancement of the apprentice's professional practice. For example, a Customer case study, a development project leading to a Customer proposal, detailed development of a new customer's account plan. It will be started after the EPA gateway decision and developed over a period of 5 months in the final year of the programme. This allows one month for the Sales Pitch and Panel Interview component of the EPA to take place (making 6 months in total).

The Work Based Project will be assessed for evidence that the Knowledge, Skills and Behaviours required of a B2B Sales Professional are inherent in the apprentice's sales practice and the content of the project must enable the following to be demonstrated:

- the approach to planning and completion of the project, including what has to be delivered on completion of the project.
- the application of the knowledge and skills to meet the outcomes in the standard
- the application of behaviours from the standard
- evidence of learning and reflection and of clear outcomes for the apprentice, their organisation and the customer

Assessment output will include a 'Knowledge, Skills and Behaviour (KSB) report card' completed by the independent assessor from the HEI who is marking the project. The report card will indicate which KSBs have been evidenced in the project and identify the remainder to be evidenced. These will then be the focus of the Panel Interview. The KSB report card will be based on the content of Appendix 2.

The HEIs will liaise with the employer and apprentice to agree a suitable project topic and title and support arrangements for the project to be undertaken. The apprentice will scope out what is required and present terms of reference and an initial plan for agreement by the employer, apprentice and HEI.

The terms of reference and plan are not assessed components of the work based project and EPA.

A typical structure for the Work Based Project may include:

- Objectives
- Business Context, covering both the employer and customer context including strategic aims, market insights and market trends
- Customer Requirements
- Solution Options
- Business Case(s)
- Sales Approach and Rationale
- Stakeholder Management
- Sales Planning and use of a Sales Methodology
- Reflection on customer meetings and outcomes and group working
- Conclusion and Learning Outcomes

The apprentice will be required to document their assumptions and to highlight the consequences of those assumptions, enabling them to demonstrate their understanding of commercial pressures, and the application of their thinking and problem solving skills.

Input from the employer and HEI will be limited to guidance in terms of project topic, scope, recommended reading. The apprentice will be required to provide a signed statement to confirm it is his / her own work.

During the presentation, the apprentice will outline their project including their rationale for choosing their topic and any tangible outcomes. Then, referencing their learning journal they will reflect and present on their learnings through the project. The presentation will last for 10 minutes with an additional 5 minutes for Q & A when the assessor may ask the apprentice 3-5 open questions as follow up questions to seek clarification. The presentation will take place within 2 weeks of project submission and will be scheduled by the assessor and at a mutually convenient time for the assessor and the apprentice.

The topic of the work based project will vary depending on the apprentice's organisation's sales approach, current context and the customer's they are working with.

Assessment of the Work Based Project will take place in the last month of the Programme and must be completed prior to the Panel Interview. An independent assessor will mark the project which will then also be moderated by an independent external assessor according to standard QAA HE processes. Please see section 9 for further details of the QAA processes.

The independent assessor will send an 'assessment report' to the panel members 1 week before the panel interview takes place. This will include the grade achieved for the Work Based Project, the KSB Report Card and highlighting any areas for specific review in the Panel Interview.

The apprentice will be advised of the outcome of the Work Based Project assessment prior to the Panel Interview.

Note that the HEI independent assessor assessing the work based project will not have been involved in the on-programme delivery.

## 7.2 Panel Interview

This will be a 50-minute session incorporating a sales pitch and interview session which will take place in the last month of the apprenticeship. It will validate and assess any KSBs not explicitly covered in the project and provide an opportunity for the panel to assess the apprentice's pitching and presentation skills.

### Sales Pitch

This will be a 20-minute pitch by the apprentice to the panel. The independent assessor will set the pitch context for example: repeat business, new product line, competitive tender. The pitch will include a 5-minute question and answer session with the panel. The 5 minutes Q&A time is included in the 20 minutes of allocated time for the Sales Pitch. The apprentice will be given the pitch context when they are notified of their interview time, (refer to section 7.3), and will have at least seven days' notice within which they will be given 0.5 day to prepare the pitch.

The Panel Interview will then culminate with a question and answer session primarily focused on the content of the learning journal. This will last for 30 minutes. Informed by the Learning Journal and the independent assessor's KSB Report Card (from the HEI) the panel of assessors must explore the apprentice's broader experience from the workplace, to demonstrate that all the skills and knowledge defined in the standard have been met. The Learning Journal is a mandatory component of the EPA and should be referenced during the Panel Interview as evidence of the apprentice's professional competence and how they have developed as a Sales Professional. Note that the panel interview will not focus on the project itself as this has been assessed previously.

The Panel Interview will either take place at the HEI or a venue mutually agreed to by the employer and the HEI. It is the responsibility of the HEI to liaise with the employer and to convene the EPA Panel Interview. The HEI will provide guidance on the nature of the Panel Interview and the assessment criteria used. This will ensure that consistent approaches are taken and that all key areas are appropriately explored. A structured template will be used to collate the panel's views to ensure consistency in approach. Information on the roles of the panel members is provided in section 7.5.

## 7.3 Practical Requirements for the Sales Pitch and Panel Interview

- The apprentice should have appropriate notice of their interview time and have at least seven days' notice
- The Independent Assessor's summary and KSB report card of the Work Based Project will be sent to the panel members 1 week before the panel interview takes place
- A copy of the Learning Journal will be made available to the panel 1 week before the panel interview takes place
- A structured brief will be used to support the panel interview to ensure a consistent approach. The structured brief will be produced by the independent assessor.
- The sales pitch and panel interview will last for 50 minutes (plus or minus 10%)
- The panel interview will be conducted face to face or in exceptional circumstances via live media
- The panel interview is conducted with the full panel present

## 7.4 Retaking End-Point assessment

Apprentices who do not successfully complete the EPA on their first take will be offered one opportunity to re-take the EPA in line with the academic regulations of the HEI. Apprentices should be provided with a supportive plan to prepare for the retake. Any retakes will be capped at a pass unless there are extenuating circumstances. Both the HEI and the employer must agree that a re-take is an appropriate course of action. Retakes are not offered to apprentices wishing to move from pass to merit or distinction.

## 7.5 EPA Assessors

As an integrated apprenticeship the degree awarding HEI will be responsible for the EPA requirements of the apprenticeship. HEIs must develop and deliver the EPA as defined in this plan, ensuring independence as described in the IfA processes.

HEIs must be approved to deliver the EPA for this standard and be on the Education and Skills Funding Agency's Register of End-point Assessment Organisations. The end-point assessment organisation must appoint appropriately qualified and experienced assessors to conduct the EPA as detailed below.

There will be two independent assessors involved in the Sales Pitch and Panel Interview component of the EPA:

- (i) An independent assessor (see table below)
- (ii) an independent B2B Sales Professional, from a third-party organization. This is required to provide expertise on sales pitches from a sales professional.

The roles of the panel members are listed in the table overleaf.

EPA Panel Member Roles

	<b>Title</b>	<b>Criteria</b>	<b>Role</b>
i	Independent Assessor	<ul style="list-style-type: none"> <li>• Masters or higher qualification in a related subject such as Sales, Marketing, Business or Work Based Learning</li> <li>• Qualified assessor</li> <li>• Will be independent of the delivery of the Programme.</li> <li>• Independent assessors must be independent of the on-programme delivery, the apprentice and their employer. Independent assessors should be sourced from another university, industry or a professional body; or if none of the above options are available another department within the same university.</li> </ul>	<ul style="list-style-type: none"> <li>• Chair of the EPA Panel</li> <li>• Provides guidance on the nature of the sales pitch, panel interview and the assessment criteria used</li> <li>• Responsible for assessment of the work based project and presentation</li> <li>• Responsible for completion of the Knowledge, Skills and Behaviour (KSB) report card'</li> <li>• Responsible for making the final decision on the work based project and presentation and sales pitch and panel interview assessment</li> </ul>
ii	Independent B2B Sales Professional	<ul style="list-style-type: none"> <li>• Senior Sales Professional in a B2B setting.</li> <li>• From an independent organisation, recommended by the Professional Body (The APS) or the HEI.</li> <li>• A minimum of 5 years of direct line management and people leadership experience.</li> <li>• Will not have been involved in the on-programme delivery</li> <li>• Must be agreed to by the HEI as the end-point assessment organisation</li> </ul>	<ul style="list-style-type: none"> <li>• Assesses the Panel Interview and provides recommended grade for consideration.</li> <li>• Sets the context for the Sales Pitch</li> </ul>

All assessors involved in the EPA process will have an understanding of the apprenticeship standard and the EPA requirements.

The independent HEI assessor will be responsible for making the final decision on the work based project and presentation and sales pitch and panel interview assessment with the final mark being derived from all panel members leading to a balanced and accurate mark being awarded. The panel mark is then submitted to an external independent examiner as per QAA guidance. Please refer to section 10.

## **8. Apprenticeship Grading**

### **8.1 Degree Grading**

The degree will be graded in accordance with the HEI academic regulations. The EPA will constitute at least 40 credits towards the final degree grade. Where an apprentice fails the EPA, they will not be awarded a degree.

### **8.2 Apprenticeship Grading**

Performance in the EPA will determine the apprenticeship grade of Distinction, Merit, Pass or Fail. Each assessment method will be graded in accordance with the HEI's assessment regulations to arrive at Pass, Merit and Distinction grades. In order to gain an apprenticeship pass or higher grade, the apprentice must achieve a minimum of a Pass in each method. An apprenticeship Pass represents full competence against the standard. A grade of Merit or Distinction means an apprentice is demonstrating competence above the standard.

The assessment decision for the EPA will be made collaboratively by the two panel assessors. In any circumstances where there are conflicting decisions, the final decision maker will be the Independent Assessor assigned this responsibility.

The EPA will be graded in accordance with HEI academic regulations using Honours degree classifications for English universities. All UK universities must follow the QAA (Quality Assurance Agency for Higher Education) Code of practice for the assurance of academic quality and standards in higher education. This ensures continued consistency.

Tables 1 and 2 overleaf outline the scoring criteria that will be applied for each assessment method:

1. Work Based Project and Presentation
2. Sales Pitch and Panel Interview

These components will be aggregated by the EPA panel into one grade at the end of the Panel Interview.

They are based on the following principles:

- all pass criteria need to be achieved; in achieving this, the apprentice will be demonstrating all knowledge, skills and behaviours in the standard
- merit builds on the demonstration of pass criteria
- distinction builds on both pass and merit criteria

Detailed guidance will be developed by the end-point assessment organisations. The occupational brief outlined in Appendix 1 defines which KSBs can/will be assessed across the EPA components.

<b><u>Work Based Project and Presentation</u></b>				
	<b>Distinction Criteria (should include all of the pass criteria plus the distinction criteria)</b>	<b>Merit Criteria (should include all of the pass criteria plus the merit criteria)</b>	<b>Pass Criteria</b>	<b>Fail Criteria</b>
<b>Work Based Project (100 marks)</b>	<p><b>Score 70 and above</b></p> <p>Demonstrates that they can undertake detailed research in order to analyse and create innovative solutions delivering tangible business benefits.</p> <p>Demonstrates that they can improve process efficiency and/or introduce commercial benefits to the organisation or the customer.</p> <p>Confident, clear and professional presentation of all materials</p> <p>Assimilates &amp; synthesises information to present it effectively to their audience</p> <p>Evidence of critical evaluation and reflection and a self-development approach</p> <p>Ability to respond to questions with authenticity and depth of understanding</p> <p>Using Appendix 2 provides evidence of the knowledge, skills and behaviours required, with emphasis on outcomes which link to:</p> <ul style="list-style-type: none"> <li>• innovative solutions and propositions</li> <li>• delivery of tangible benefits</li> <li>• provide a compelling proposal or recommendation</li> <li>• customer focus or strategic alignment of activities</li> <li>• proven stakeholder analysis, building effective team relationships &amp; networks</li> <li>• accurate, pro-active and well-structured planning</li> </ul>	<p><b>Score 60 to 69</b></p> <p>All evidenced materials are well-structured with strong aims, clear objectives and outcomes.</p> <p>Provides ideas and ensures content is effectively communicated with reference to market &amp; sector insights.</p> <p>All proposal outcomes are linked to the strategic direction of the organization and/or customer</p> <p>Delivers confident and well-structured professional presentations</p> <p>Uses a range of tools and techniques to present and effectively communicate to their audience</p> <p>Provides evidence of reflection and evaluation</p> <p>Ability to respond to questions with confidence and clarity of understanding.</p> <p>Using Appendix 2 provides evidence of the knowledge, skills and behaviours required, with emphasis on outcomes which link to:</p> <ul style="list-style-type: none"> <li>• solution development or strategic recommendations</li> <li>• well defined benefits</li> <li>• customer needs or a successful alignment of activities</li> <li>• responsiveness, interpersonal skills, and team relationships, stakeholder analysis &amp; networking</li> <li>• accurate, pro-active and clear planning</li> </ul>	<p><b>Score 40 to 59</b></p> <p>Using Appendix 2 provides evidence of the knowledge, skills and behaviours required.</p> <p>Uses a range of techniques to develop proposals and present them to the audience.</p> <p>Demonstrates a high standard of written English.</p> <p>Demonstrates in-depth knowledge of:</p> <ul style="list-style-type: none"> <li>• the contemporary business environment, industry sector and competitors. and the current approach of the organisation and/or customer</li> <li>• evidence of how the company/customer generates value</li> <li>• in-depth portfolio and product knowledge</li> <li>• in-depth analysis and application of market insights and intelligence</li> <li>• understanding of Sales Planning frameworks and tools</li> <li>• evidence of stakeholder analysis with stakeholder map</li> </ul> <p>All evidenced materials include a reasonable structure, flow and ordering of content.</p> <p>Presentations are well structured summarising all key points</p> <p>Demonstrates evidence of reflection</p> <p>Ability to respond to questions competently and accurately</p>	<p><b>Score 39 or less</b></p> <p>Fails to provide evidence to meet knowledge, skills and behavioral requirements as contained in Appendix 2 and across the KSBs listed for each EPA assessment component.</p>

Table 1

<b>Sales Pitch and Panel Interview</b>				
	<b>Distinction Criteria (should include all of the pass criteria plus the distinction criteria)</b>	<b>Merit Criteria (should include all of the pass criteria plus the merit criteria)</b>	<b>Pass Criteria</b>	<b>Fail Criteria</b>
<b>Panel Interview (100 marks)</b>	<p><b>Score 70 and above</b></p> <p>Delivers a confident, clear and detailed sales pitch.</p> <p>Presents solutions and the commercial benefits that clearly demonstrates the value proposition and customer benefits.</p> <p>Utilising insights, demonstrates excellent knowledge of the market and of the sector.</p> <p>Assimilates &amp; synthesises information to present it effectively and with credibility.</p> <p>Demonstrates ability to respond to questions and objections with authenticity and depth of understanding.</p> <p>Relates well to the customer, establishing credibility, building rapport and demonstrating a positive mindset.</p> <p>Evidence of critical evaluation and reflection and a self-development approach</p>	<p><b>Score 60 to 69</b></p> <p>Delivers a confident and well-structured pitch.</p> <p>Solution effectively communicated.</p> <p>Commercial benefits demonstrate the value proposition and customer benefits.</p> <p>Incorporates market insights demonstrating knowledge of the market and of the sector.</p> <p>Uses a range of techniques to present and effectively communicate to their audience</p> <p>Ability to respond to questions with confidence and clarity of understanding</p> <p>Relates well to the customer, establishing credibility</p> <p>Evidence of reflection and some self-development activities</p>	<p><b>Score 40 to 59</b></p> <p>Using Appendix 2 provides evidence of the knowledge, skills and behaviours required.</p> <p>Well-structured pitch outlining the solution, and compelling value proposition in a clear, quantifiable way.</p> <p>Demonstrates integrity and good sales practice.</p> <p>Demonstrates how the negotiation strategy achieved mutually agreeable outcomes</p> <p>Refers to market insights to demonstrate knowledge of the market and of the sector.</p> <p>Evidences a systemic approach to building connections and networks</p> <p>Demonstrates a positive mindset, flexible attitude, emotional intelligence and empathy</p> <p>Ability to respond to questions competently and accurately</p> <p>Some evidence of reflection and self-development</p>	<p><b>Score 39 or less</b></p> <p>Fails to provide evidence to meet knowledge, skills and behavioral requirements as contained in Appendix 2 and across the KSBS listed for each EPA assessment component.</p>

Table 2

In order to gain an apprenticeship pass or higher grade, the apprentice must achieve a minimum of a Pass in each EPA component. An apprenticeship Pass represents full competence against the standard. A grade of Merit or Distinction means an apprentice is demonstrating competence above the standard.

An apprentice must achieve a Merit or higher in each assessment method to achieve an overall apprenticeship Merit grade. An overall apprenticeship Distinction grade can only be achieved with a Distinction being achieved in both assessment methods. Table 3 below shows the combinations of assessment method grades to determine the overall EPA and apprenticeship grade.

<b><i>Work Based Project and Presentation Grade</i></b>	<b><i>Sales Pitch and Panel Interview Grade</i></b>	<b><i>Overall Apprenticeship Grade</i></b>
Distinction	Distinction	DISTINCTION
Distinction	Pass	MERIT
Distinction	Merit	MERIT
Merit	Distinction	MERIT
Merit	Merit	MERIT
Merit	Pass	PASS
Pass	Merit	PASS
Pass	Pass	PASS
Fail	Pass	FAIL
Pass	Fail	FAIL

Table 3

## 9. Internal Quality Assurance

Internal quality assurance refers to the requirements that HEIs as IAOs must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. IAOs for this standard must undertake the following:

- appoint independent assessors and panel members that meet the requirements as detailed in this plan – see above
- produce assessment tools and supporting materials for the 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 and over time
- operate regular standardisation events that enable assessors to attend a minimum of one event per year
- operate moderation of assessment activity and decisions, through examination of documentation and observation of activity, with a minimum of 5% percent of each independent assessor's assessments moderated

- have an external examiner in line with University requirements

## **10. External Quality Assurance**

We are exploring whether QAA can undertake external quality assurance for this standard, arrangements will be confirmed by the end of 2017.

## **11. Affordability**

The costs for the on-programme aspect of the apprenticeship training and the EPA will be bundled up into one apprenticeship cost for the employer. The funding band allocated to this apprenticeship is to be confirmed.

The cost of the end-point assessment component will remain constant at between 15%-20% of the total cost. This is based on estimates provided by three HEIs using known costs for the external assessors and estimated costs for the panel interview.

## **12. Anticipated Volumes**

Anticipated volumes of starts from the trailblazer group members for 2017/2018 number 70+ and are forecast at 120+ for 2018. The APS (Association of Professional Sales) has also started to gather predicted volumes and currently 21 organisations have forecast an average of 10 starts each leading to a further 210 starts.

The consultation delivered wide support and interest from other B2B Sales organisations and we expect the trailblazer volume totals to be matched by these and other organisations.

## **13. Implementation**

HEIs are extremely capable in delivering synoptic and robust assessment approaches that represent the application of an apprentice's skills, knowledge and professional behaviours and the approach presented offers an affordable and scalable solution to assessment for this apprenticeship.

## **14. Professional Registration**

The Association of Professional Sales have confirmed that the B2B Sales Professional assessment plan aligns to both the APS certification and qualification framework, alongside their membership criteria for registration. A successful apprentice will be eligible for professional sales certification at level 6 within the APS certification framework.

**Appendix 1 – Occupational Brief with EPA components**

<b><u>Knowledge</u></b>		<b><u>Skills</u></b>		<b><u>Values &amp; Behaviours</u></b>	
Prospecting and Qualification	WBP, PI	Working with others	WBP, PI	Ethics, Integrity and Trust	WBP, PI
Sales Planning	WBP, PI	Consultative Selling	WBP, PI	Management of Self	WBP, PI
Solution Development	WBP, PI	Pitching	PI	Interpersonal Skills	PI
Developing Proposals	WBP, PI	Negotiation and Closing	WBP, PI	Customer Focus	WBP, PI
Commercial Acumen	WBP, PI	Psychology of Sales	WBP, PI		
Post Sales Delivery	WBP PI	Leveraging Digital Business	WBP, PI		
Applied Insights	WBP, PI				

WBP = Work Based Project and Presentation

PI = Panel Interview (including Sales Pitch and interview informed by the Learning Journal)

## **Appendix 2 – Assessment Criteria**

The tables below indicate how B2B Sales Professional apprentices are assessed to ensure that they demonstrate full professional competence in relation to the Apprenticeship Standard. The assessors will grade the EPA components based on the scoring criteria defined in section 8.2.

- The **outcomes required** are the areas of knowledge, skills, values and behaviours specified in the Apprenticeship Standard
- The **forms of formative and summative assessment** constitute the ‘form’ of evidence of learning and/or professional competence that is assessed
- The evidence of learning and/or professional competence submitted/presented for assessment (including End-point Assessment) is assessed against the **assessment criteria** as the measure of professional competence required by the Apprenticeship Standard at level 6.

**A – Assessing knowledge outcomes** – all knowledge outcomes need to be demonstrated to achieve full professional competence

	<b>Knowledge Outcome required</b>	<b>EPA component to be used for assessment</b>	<b>Assessment criteria</b>
<b>Prospecting and Qualification</b>	Analyse the business environment, industry, sector and competitors to identify potential new customers. Build, prioritise and manage the pipeline of prospects according to their potential, ensuring strategic and commercial fit with own organisation.	Work Based Project & Presentation Sales Pitch & Panel Interview	Demonstrate In-depth knowledge of the contemporary business environment, industry, sector and competitors.  Identify potential customers and build, prioritise and manage the pipeline of prospects demonstrating an understanding of their potential in the context of the strategic and commercial fit with own organisation  Qualify a customer suspect opportunity.  Show evidence of decision making criteria and an action plan to pursue and manage opportunity.  Demonstrate application of each stage of the Sales Process and how it applies to their workplace systems and ways of working

<b>Sales Planning</b>	Plan strategically and consistently to meet sales targets through prospecting, qualification and pipeline management. Define, refine and validate specific customer requirements in the terminology of the customer's business and industry.	Work Based Project & Presentation Sales Pitch & Panel Interview	<p>Demonstrate understanding of Sales Planning frameworks and relevant planning methodologies and tools. For example, Account plans, Territory plans, New Business plans, Channel plan etc. Demonstrate use across long and short deal cycles.</p> <p>Ability to compile a "Customer Plan" defining, refining and validating specific customer requirements in the terminology of the customer's business and industry.</p> <p>Management of a Customer plan and evidence of its practical uses with customers, internal stakeholders and partners.</p>
<b>Solution Development</b>	Use customer insight/requirements underpinned by an excellent level of portfolio and product knowledge. Analyse and create innovative solutions and propositions that deliver tangible business benefits to customers.	Work Based Project & Presentation Sales Pitch & Panel Interview	<p>Demonstrate an insightful and analytical understanding of market dynamics and customer needs.</p> <p>Understanding of how different companies generate value so that the sales person can deliver value to those companies.</p> <p>Evidence of in-depth portfolio/product knowledge and reasoning for the 'best fit' proposed solution to customer needs defining tangible business benefits.</p>
<b>Developing Proposals</b>	Develop effective sales proposals, tender documents and presentations utilising a range of communications tools and techniques. Produce compelling formal proposals using the customers' terminology and framed in a way to meet the customers' needs.	Work Based Project & Presentation Sales Pitch & Panel Interview	<p>Use a range of communication tools and techniques appropriate to the customer's environment to develop commercial proposals and tenders.</p> <p>Produce compelling formal proposals designed to meet or exceed meet customers' needs.</p> <p>Proposals demonstrate a high standard of written English framed to meet relevant regulatory and legal requirements.</p>

<b>Commercial Acumen</b>	Contribute to commercial strategies with a deep understanding of financial principles and the external environment such as relevant markets, competitors and associated products and services. Assess opportunities and risks for consideration through line management of others to support successful outcomes.	Work Based Project & Presentation Sales Pitch & Panel Interview	Demonstrate an In-depth knowledge of financial principles which demonstrate an understanding of the inter-relationships between external business environment factors such as, markets, competitors, products, services, costs and margins.  Evaluate potential commercial strategies and articulate the financial value of solutions.  Demonstrate an understanding of methods to analyse and evaluate financial reports.
<b>Post Sales Delivery</b>	Manage customer's expectations and the strategic value of achieving these. Influence teams to ensure company alignment with the customer. Analyse the company's performance together with the customer's view of every interaction and surmise how this can be used to inform continuous improvement.	Work Based Project & Presentation Sales Pitch & Panel Interview	Demonstrates an understanding of the strategic value of achieving customer expectations. Applies methods to analyse and review the value that has been delivered with the customer.  Evidence of leadership, problem solving, company alignment and the quest for continuous performance improvement of post-sales delivery.  Analysis of customer issues understanding the root causes of the issues with action plan and outcomes.
<b>Applied Insights</b>	Interpret and apply customer, competitor, consumer and market insight and intelligence from digital and traditional sources. Use these insights to effect actionable and ethical change of behaviors for mutual commercial benefit.	Work Based Project & Presentation Sales Pitch & Panel Interview	In-depth analysis of market insights and intelligence and the inter-relationships between customer, competitor and market intelligence.  Application of the insights to influence a change of mindset for mutual, commercial benefit.

**B – Assessing skill outcomes** – all skill outcomes need to be demonstrated to achieve full professional competence.

	<b>Skills Outcomes required</b>	<b>EPA component to be used for assessment</b>	<b>Assessment criteria</b>
<b>Working with others</b>	<p>Influential, able to conduct stakeholder analysis and develop strong relationships at all levels, internally and externally, to build trust.</p> <p>Interacts professionally and ethically maintaining a positive and flexible attitude. Demonstrates emotional intelligence.</p>	<p>Work Based Project &amp; Presentation</p> <p>Sales Pitch &amp; Panel Interview</p>	<p>Demonstrates a positive and flexible attitude and strong influencing skills, within a professional and ethical context. Interacts well with others demonstrating emotional intelligence and empathy.</p> <p>Evidence of stakeholder analysis and management to develop strong relationships.</p>
<b>Consultative Selling</b>	<p>Works with customers to identify new business and market challenges, utilising insights and good questioning and listening techniques.</p> <p>Identifies strategic and innovative solutions integrating products and excellent service solutions, to meet customer needs.</p>	<p>Work Based Project &amp; Presentation</p> <p>Sales Pitch &amp; Panel Interview</p>	<p>Demonstrates use of research to conduct pre-work analysis and excellent use of listening, questioning and consultative selling skills to identify new business needs.</p> <p>Uses creative thinking to help develop innovative product and service solutions that meet customer needs.</p>

<b>Pitching</b>	Leads a confident, clear and compelling sales pitch in front of a customer, which builds rapport, establishes credibility and delivers commercial benefit. Handles questions, objections and demonstrates the value of the proposal in a clear, quantifiable way.	Sales Pitch & Panel Interview	<p>Plan for a pitch, identifying approach and background research and construct a compelling value proposition relating to a proposal in a clear, quantifiable way.</p> <p>Lead a compelling sales pitch in front of a customer and demonstrate skills to build rapport and establish credibility. Ability to handles questions and objections.</p> <p>Pitching to a customer will be observed by the apprentice's line manager. Review of the apprentice's pitching skills will be part of the EPA gateway decision</p>
<b>Negotiation and Closing</b>	Applies the principles of negotiation, develops strategies and tactics to a mutually agreeable outcome, ensuring both customer and supplier leave committed to outcome.	Work Based Project & Presentation Sales Pitch & Panel Interview	<p>Evidence of negotiation planning.</p> <p>Development of a negotiation strategy and tactics to achieve mutually agreed outcomes and commitment from both buyer and supplier.</p>
<b>Psychology of Sales</b>	<p>Critically reflects on the different psychological needs of customers and other key stakeholders in the buying/selling process.</p> <p>Considers strategic and organisational context when adapting their sales approaches, by using the psychological models pertinent to developing positive and ethical buyer and seller relationships.</p>	Work Based Project & Presentation Sales Pitch & Panel Interview	<p>Evidence of customer stakeholder map based on individual needs and buying criteria to develop positive and ethical buyer and seller relationships.</p> <p>Use of psychological models to draw on and reflect customer needs and explain suggested sales approaches, based on the customer analysis and their organisational context.</p>

<b>Leveraging Digital Business</b>	<p>Adopts different approaches to social selling &amp; digital technologies which aid the sales process. Develops a digital selling strategy that leverages social selling to support lead generation, nurturing and customer engagement.</p> <p>Develops digital networks and drives insight led engagements.</p> <p>Measures results and return on investment.</p>	<p>Work Based Project &amp; Presentation</p> <p>Sales Pitch &amp; Panel Interview</p>	<p>Demonstrates the effective use of social selling technologies, networks and strategies to promote customer engagement with measurable results and return on investment potential.</p> <p>Applies a systemic approach to building connections and networks and selects the strategies and techniques to achieve optimum return on a digital network.</p>
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### C – Assessing behaviour and values – all values and behaviour outcomes need to be demonstrated to achieve full professional competence

	<b>Professional Behaviours and Values Outcomes required</b>	<b>EPA component to be used for assessment</b>	<b>Assessment Criteria</b>
<b>Ethics, Integrity and Trust</b>	<p>Promotes and protects good sales practices (in accordance with the organisation's Sales Code of Conduct).</p> <p>Maintains the highest level of integrity in all business relationships.</p>	<p>Work Based Project &amp; Presentation</p> <p>Sales Pitch &amp; Panel Interview</p>	<p>Demonstrates adherence to codes of sales conduct as defined by a relevant recognised professional association.</p> <p>Maintains the highest levels of professional ethics, integrity and trust in all business relationships.</p>
<b>Management of Self</b>	<p>Ensures effective time management, prioritisation and strategic alignment of activities.</p> <p>Continually reflects on and reviews own performance.</p> <p>Understands impact on others.</p>	<p>Work Based Project &amp; Presentation</p> <p>Sales Pitch &amp; Panel Interview</p>	<p>Shows evidence of continuous improvement taking responsibility for time management, prioritisation and the strategic alignment of own activities.</p> <p>Evidence of continual critical reflection on own performance and its impact on others.</p>

<b>Interpersonal Skills</b>	<p>Relates well to all kinds of people and builds constructive and effective relationships, diplomatically and tactfully.</p> <p>Demonstrates a positive mindset and attitude and has a range of skills and approaches and knows when to use different models of communication and influencing with whom.</p>	Sales Pitch & Panel Interview	<p>Demonstrates diplomacy and tact in building constructive and effective relationships with a positive mindset.</p> <p>Uses appropriate models of communication and influencing sensitive to different stakeholder and business scenarios.</p>
<b>Customer Focused</b>	Acts as a customer advocate within their own organisation.	Work Based Project & Presentation Sales Pitch & Panel Interview	Demonstrates effective customer advocacy within their own organisation