Highfield Level 3 End-Point Assessment for ST0201 Supply Chain Practitioner (Fast Moving Consumer Goods)

End-Point Assessment Kit

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EPA Kit

Contents

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How to use this EPA Kit

Welcome to the Highfield End-Point Assessment Kit for the Supply Chain Practitioner (Fast Moving Consumer Goods) apprenticeship standard.

Highfield is an independent end-point assessment organisation that has been approved to offer and carry out the independent end-point assessments for the Level 3 Supply Chain Practitioner (Fast Moving Consumer Goods) apprenticeship standard. Highfield internally quality assures all end-point assessments in accordance with its IQA process, and additionally all end-point assessments are externally quality assured by the relevant EQA organisation.

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

Key facts

Apprenticeship standard:	Supply Chain Practitioner (Fast Moving Consumer Goods)
Level:	3
On-programme duration:	Typically 30 months
End-point assessment window:	Typically 4 months
Grading:	Pass/distinction
End-point assessment methods:	Multiple-choice test Project and presentation Interview underpinned by a portfolio of evidence

In this kit, you will find:

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

Introduction

Standard overview

Fast-moving consumer goods (FMCG) supply chain practitioners will work in 1 or more supply chain functions. Supply chain functions include procurement, forecasting, planning manufacture, customer service and logistics. Typical duties could include forecasting customer demand as a junior demand planner, liaising with the factories' schedule production as a junior supply planner, processing orders as a customer service operative and working with hauliers and distribution centres as an assistant transport planner.

They have a comprehensive understanding of the entire supply chain, are responsible for their impact on each function and strive to deliver the best value for their business and customer. Due to the high number of interactions both within and outside of the business, they need strong relationship building, influencing, stakeholder management and communication skills alongside sound analytical, information technology and numeracy skills, with an ability to work in a fast-paced environment with frequently changing requirements.

Fast-moving consumer goods (FMCG) supply chain practitioners will be able to progress to management or specialist roles.

On-programme requirements

Although learning, development and on-programme assessment is flexible, and the process is not prescribed, the following is the recommended baseline expectation for an apprentice to achieve full competence in line with the Supply Chain Practitioner (Fast Moving Consumer Goods) apprenticeship standard.

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

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

- achievement of level 2 English and maths. If the apprentice began their apprenticeship training before their 19th birthday, they will still be subject to the mandatory requirement to study towards and achieve English and maths. The requirements for English and maths are optional for apprentices aged 19+ at the start of their apprenticeship training.

- any qualifications specified by the employer.
- completion of a portfolio through which the apprentice gathers evidence of their progress.
- study days and training courses.
- mentoring/buddy support.
- regular performance reviews undertaken by the employer.
- structured one-to-one reviews of their progress with their employer and/or training provider.

Portfolio of evidence

The apprentice must compile a portfolio of evidence during their time on-programme that is mapped against the knowledge, skills and behaviours assessed in the interview underpinned by a portfolio of evidence.

It will typically contain **7 discrete pieces of evidence**. Evidence may be used to demonstrate more than **1 knowledge, skill or behaviour** as a qualitative approach is suggested as opposed to a quantitative approach.

Evidence sources for the portfolio may include:

- workplace documentation and records
- witness statements
- annotated photographs
- video clips with a maximum total duration of 10 minutes and where the apprentice must be in view and identifiable

This is not a definitive list and other evidence sources are possible. Given the breadth of context and roles in which this occupation works, the apprentice will select the most appropriate evidence based on the context of their practice against the relevant knowledge, skills and behaviours.

The portfolio should not include reflective accounts or any methods of self-assessment. Any employer contributions should focus on direct observation of performance (for example, witness statements) rather than opinions.

The portfolio must be accompanied by a Portfolio Matrix. This can be downloaded from our website. The Portfolio Matrix must be fully completed including a declaration by the employer and the apprentice to confirm that the portfolio is valid and attributable to the apprentice.

The portfolio of evidence must be submitted to Highfield at gateway. It is not directly assessed but underpins the interview.

Project scope

The apprentice must produce a project title and scope of approximately **200 words**, outlining whether the project is process review focused or issue focused. The project title and scope will also indicate milestones, objectives, timelines and key performance indicators (KPIs).

Agreement of the project title and scope by the employer will be required to indicate organisational approval.

The project must meet the needs of the employer's business and be relevant to the apprentice's occupation and apprenticeship. To ensure the project allows the apprentice to meet the KSBs mapped to this assessment method to the highest available grade, Highfield must sign-off the project's title and scope at gateway to confirm it is suitable.

A **project scoping document** should be completed by the apprentice which includes a declaration from the employer that the project meets the needs of their business. This form is available to download from the Highfield Assessment website. It will also need to be indicated as completed on the Gateway Readiness Report (available from Highfield Assessment website).

Once the project scope has been approved, after gateway, the apprentice will expand this project scope into a project report, which **will** be assessed.

Use of artificial intelligence (AI) in the EPA

Where AI has been used as part of the apprentice's day-to-day work and forms part of a project report, presentation, or artefact, it should be referenced as such within the work. AI must not be used to produce the report or portfolio.

Where AI has been used as part of a portfolio that underpins an interview or professional discussion or any other assessment method, it should be fully referenced within the portfolio.

Readiness for end-point assessment

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

- the apprentice must have achieved **level 2** English and maths. The requirements for English and maths are mandatory for all apprentices aged between 16-18 at the start of their apprenticeship training. The requirements for English and maths are optional for apprentices aged 19+ at the start of their apprenticeship training.
- the apprentice must have gathered a **portfolio of evidence** against the required elements to be put forward to be used as the basis for the interview.

- an appropriate **workplace project** for the end-point assessment must be agreed for the apprentice, based on their current job role.
- the apprentice must have gathered their organisation's policies and procedures as requested by Highfield. For guidance, a list of examples has been provided below.
    - Data protection and cyber security
    - Standard operating procedures (SOPs)
    - Environmental sustainability
    - Risk assessments
    - Health and safety
    - Equality, diversity and inclusion

  This list is not definitive. The policies and procedures may already be included as part of the portfolio of evidence.
- the line manager (employer) must be confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard and that the apprentice is competent in performing their role. To ensure this, the apprentice must attend a formal meeting with their employer to complete the Gateway Readiness Report.
- the apprentice and the employer should then engage with Highfield to agree a plan and schedule for each assessment activity to ensure all components can be completed within a 4-month end-assessment window. Further information about the gateway process is covered later in this kit.

If you have any queries regarding the gateway requirements, please contact your EPA customer engagement manager at Highfield Assessment.

Order of end-point assessments

There is no stipulated order of assessment methods. This will be discussed with the apprentice, training provider and/or employer with our scheduling team when scheduling the assessments to ensure that the learner is provided with the best opportunity to attempt the assessment.

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The Highfield approach

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

Documents used in developing this end-point assessment

Standard (2024)

https://www.instituteforapprenticeships.org/apprenticeship-standards/supply-chain-practitioner-fast-moving-consumer-goods-fmcg-v1-1

End-point assessment plan (ST0201/v1.1)

https://www.instituteforapprenticeships.org/apprenticeship-standards/supply-chain-practitioner-fast-moving-consumer-goods-fmcg-v1-1

Specific considerations

Highfield's approach does not deviate from the assessment plan.

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Gateway

How to prepare for gateway

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

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

- customer feedback
- recordings
- manager statements
- witness statements

As well as evidence from others, such as:

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

In advance of gateway, apprentices will need to have completed the following. The requirements for English and maths listed below are mandatory for all apprentices aged between 16-18 at the start of their apprenticeship training. The requirements for English and maths listed below are optional for apprentices aged 19+ at the start of their apprenticeship training.

- Achieved level 2 English
- Achieved level 2 maths
- Submitted a suitable portfolio of evidence to be used as the basis for the interview (see the Portfolio Matrix)
- Submitted a project title and scope
- Submitted their organisation's policies and procedures as requested by Highfield

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

The gateway meeting

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

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

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

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

Reasonable adjustments and special considerations
Highfield Assessment has measures in place for apprentices who require additional support. Please refer to the Highfield Assessment Reasonable Adjustments policy for further information/guidance.

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

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

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

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The Supply Chain Practitioner (Fast Moving Consumer Goods) apprenticeship standard

Below are the knowledge, skills and behaviours (KSBs) from the standard and related assessment criteria from the assessment plan. On-programme learning will be based upon the KSBs and the associated assessment criteria are used to assess and grade the apprentice within each assessment method.

Multiple-choice test
Knowledge
K1 Characteristics and **processes** of the end-to-end fast-moving consumer goods supply chain
K4 Legislation and **policies that influence the supply chain**
K5 The characteristics and specific needs of different customer groups, for example, Major Multiples, Wholesalers, Convenience, Value Retailers, Discounters, Ecommerce
K8 The principles of commercial and cost efficiencies in supply chain
K9 Types of logistics costs and their components, for example, Transportation costs, Inventory costs, Labour costs, Customer service costs, Storage costs, Administration costs
K11 The principles of capacity planning including, rough cut, resource requirement, capacity requirement, warehouse capacity, hauliers, logistics and resources
K12 The principles of strategic and **operational decision making**
K14 The principles of forecasting
K17 Factors that impact on supply chain planning: capacity, product life, for example, customer requirements - exclusive range or NPD, producing factory location, co- manufacturing, promo cycles, sustainability

K32 Awareness of health and safety regulations, standards, and guidance and impact on role. **Control of Substances Hazardous to Health (CoSHH)**. Fire safety. Hazards and risks. **Health and Safety at Work Act**. Isolation and emergency stop procedures. **Manual handling**. **Personal Protective Equipment (PPE)**. Safety equipment: guards, signage, fire extinguishers. Safety signage. Situational awareness. Slips, trips, and falls. Working in confined spaces. **Working at height**
Amplification and guidance
• **Characteristics** include but are not limited to: ○ high volume sales/low profit margin ○ quick inventory turnaround ○ wide range of products ○ rapid changes in market demand (influenced by seasons) ○ intense market competition • **Processes** include but are not limited to: ○ the 5S process: ▪ sort, straighten, shine, standardise and sustain ▪ well organised and clean working areas ▪ health and safety safe working practices ○ well-co-ordinated logistical planning, involving all stakeholders ○ management for the movement of goods from the manufacturer/supplier to point of sale ○ automation processes ○ standard operating procedures ○ active interaction with internal and external customers using supplier relationship management (SRM) • **Legislation** that influence the supply chain may include: ○ Workplace (Health, Safety and Welfare) Regulations – ensures the working environment is safe, free from risk and that appropriate equipment is provided where necessary, for example, adequate heating and lighting. ○ General Data Protection Regulation (GDPR) and Data Protection Act – the 7 principles when handling data.

- Modern Slavery Act – measures that should be in place on how modern slavery and human trafficking should be dealt with.
- Environment Act – application of the legislation will improve air and water quality, tackle waste, increase recycling, halt the decline of species and improve our natural environment.
- Worker Protection (Amendment of Equality Act) Act – prevents discrimination in the workplace. Treating employees less favourably than someone else because they have 1 or more of the 9 protected characteristics.
- Food Safety Act – standards businesses need to meet to protect consumers such as the first-expired-first-out (FEFO) system and critical control points. Procedures may implement the 5Ss.
- Provision and Use of Work Equipment Regulations (PUWER) – requires that equipment provided for use at work is suitable for the intended use, safe for use, maintained in a safe condition and inspected to ensure it is correctly installed and does not subsequently deteriorate, in accordance with the manufacturer's guidelines.
- Lifting Operations and Lifting Equipment Regulations (LOLER) – designed to make lifting operations and the use of lifting equipment as safe as possible. The regulations apply to any lifting equipment used in the workplace.
- Working Time Directive – protects workers by limiting the individual working hours per week and by setting minimum standards for rest time and annual leave, including the maximum number of hours of driving per week.
  - An LGV driver can only drive for a maximum of 56 hours per week
  - An LGV driver must rest for a minimum of 9 hours within a 24-hour period
- Driver Certificate of Professional Competence (CPC) – training requirements. States that HGV, LGV, coach and bus drivers must complete a minimum of 35 hours of periodic training every 5 years.
- Good Manufacturing Practice (GMP) – ensures that products are consistently produced and controlled according to quality standards, which improves the overall performance of different systems.

- **Policies that influence the supply chain** may include:
  - Health and safety policy
  - Manual handling policy
  - Flexible working policy
  - Recycle, reuse and waste procedures
  - Environmental policy
  - Sustainability policy – a sustainable supply chain integrates environmental and ethical practices

- Goods in/out procedures
- MOT and vehicle servicing policies
- How to control environmental, organisational, individual, ergonomic, safety, biological, physical, chemical and workload hazards

- **The characteristics and specific needs of different customer groups:**
  - major multiples:
    - head office centralised buying process
    - oversees the operations of their stores
  - wholesalers:
    - buy products in bulk and sell in smaller quantities
    - buy products from manufacturers or producers directly
    - may use a variety of representatives to distribute their goods
  - convenience:
    - customers purchase frequently
    - products at a low price point
    - easily available for customers
    - buy from suppliers and representatives
  - value retailers:
    - products purchased from different suppliers
    - resells to individuals or smaller businesses
  - discounters:
    - rely on bulk purchasing and efficient distribution
    - offer products at lower prices than traditional retail stores
  - ecommerce:
    - buying and selling goods and services online
    - these retailers/sellers may expect a warehouse-to-customer delivery model with packing and shipping included within the contract
    - enables a business to share and operate a variety of systems
    - internet security should be implemented to ensure safe transactions
    - extended return terms may be expected to comply with distance selling regulations, and export duties and tax might have to be included in contract terms

- **The principles of commercial and cost efficiencies** may include:
  - Smarter sourcing decisions leading to lower costs through sustainable suppliers
  - Reducing risk to make greater profit
  - Robust processes in place
  - Accurate forecasting
  - Standard operating procedures (SOPs)
  - IT systems and software

- **Types of logistics costs and their components** may include:
  - transportation costs:
    - fees charged by carriers
    - operational costs such as fuel, fuel surcharges, running costs for fleet repairs, maintenance costs, costs for air, railways and water
    - recruitment, training and supervision
  - inventory costs:
    - costs associated with customer needs
    - the IT systems and tools to monitor and control inventory, stock levels, storage of products and managing the number of units
  - labour costs:
    - recruitment, training and supervision
    - certification and qualifications
    - advertising and agency fees
  - customer service and administration costs:
    - staffing and customer contact
    - the IT systems and software associated resources for order processing
    - recruitment, training and supervision
  - storage costs:
    - cost of warehouse including rental, security and location
    - storage capacity and size of warehouse
    - labour costs such as recruitment, training and supervision
    - measure of performance data costs

- transportation fixed costs:
  - insurance
  - tax
  - depreciation
  - driver wages
  - operations managers and general supervision costs
  - density of goods
  - destination of goods
  - type of goods
- packaging costs:
  - labour
  - materials
  - technology
- mechanical handling equipment (MHE) costs:
  - rentals
  - maintenance
  - training and certification
  - personal protective equipment (PPE)
  - fuel costs
  - charging areas

- **The principles of capacity planning** may include:
  - rough cut – long-term capacity planning
  - calculating the resource capacity of the current team
  - determining required capacity
  - measuring capacity gaps
  - aligning capacity with demand
  - forecasting anticipated demand and analysing historical data

- **The principles of strategic** decision-making may include:
  - goals set for revenue growth
  - setting priorities
  - focusing energy and strengthening operations
  - lean management

- The principles of **operational decision making** may include:
  - detailed roadmaps for major projects
  - short-term objectives
  - aligning responsibilities to individual team members or departments
  - everyone working towards common goals
  - implementation of KPIs to monitor performance

- **The principles of forecasting** may include:
  - the prediction of long and short-term sales
  - forecasts should be generated and updated regularly
  - demand forecasting enables the estimation of total sales and revenue
  - accurate sales forecasting is essential for making key decisions for short-term spending
  - consequences of inaccurate forecasting may be stock shortfalls, revenue loss, service level agreement (SLA) penalties, wastage and decreased customer satisfaction

- **Factors that impact on supply chain planning** may include:
  - exclusive ranges – product lines tailored to specific customer needs
  - new ranges and products (New Product Development (NPD)) – there may be different processes for goods in, storage, picking, packing and despatch
  - factory location can impact on lead times, transportation costs and logistical difficulties
  - co-manufacturing (a facility that manufactures a product line or receives finished production bulk and despatches)
  - promo cycles - planning for promotional activities involves anticipating spikes in demand and ensuring sufficient inventory and logistical support is available
  - sustainability – using sustainable and ethically sourced raw materials

- availability of quality and accurate data/inventory levels
- competition in the market
- economic conditions such as material shortages and climate shifts
- ability of managers
- equipment capabilities
- balancing labour with productivity
- allocated storage locations for different goods (ambient, chilled and frozen)

- **Control of Substances Hazardous to Health (CoSHH)** – the law requires employers to adequately control exposure to materials in the workplace that cause ill health

- **Health and Safety at Work Act** – general duties of employers and employees, and risk assessment requirements:
  - employer's policies may require staff to wear protective clothing for certain tasks
  - employer's procedures may require staff to follow a particular pedestrian route in the warehouse
  - employers must train staff appropriately for tasks they are carrying out, such as lifting heavy objects
  - risk assessments are required for organisations with 5 or more staff

- **Manual Handling** Operations Regulations – legal requirements designed to protect workers from the risks associated with manual handling tasks

- **Personal Protective Equipment (PPE)**, for example, may include helmets, safety glasses, gloves, hearing protection and high-visibility clothing

- **Working at Height:**
  - take the necessary precautions to prevent injury
  - assess the risks associated with working at height
  - workers must be trained and competent in working at height tasks and in the use of any associated equipment
  - working at height must be properly planned and carried out in a safe manner
  - adhere to the Working at Height Regulations

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K16 The use of data to inform decision making</td><td>S10 Analyse data against supply chain key performance indicators to identify trends and themes that affect the fast-moving consumer goods supply chain

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<tr><th colspan="2">Project and presentation</th></tr>
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<tr><td>DA1 Analyses supply chain data, derived from data management systems, tools and key performance indicators, to identify trends or themes that affect the fast-moving consumer goods supply chain (K2, K6, S10)

DA2 Applies the principles of root cause analysis and problem solving techniques to lead on and carry out problem solving activities in line with task requirements (K16, S12)</td><td>DA3 Reflects and amends their approach during the analysis process, based on trends and themes they have identified to refine approach and ensure outcomes best support and inform the project scope (K2, K6, K16, S10, S12)</td></tr>
<tr><th colspan="2">Amplification and guidance</th></tr>
<tr><td colspan="2">Supply chain key performance indicators (KPIs):
inventory KPIs – metrics that allow the monitoring and decision-making about stock. They offer information about sales, turnover, demand, costs, customer relationships and processes.
forecast accuracy KPIs – typically calculated as the difference between actual and forecasted demand divided by the actual demand.
plan attainment KPIs – measuring of completed planned work orders produced and shipped within the original lead time.
customer service KPIs – tracking and optimising performance of customer support teams.</td></tr>
</table>

    - vehicle utilisation KPIs – these determine whether fleets are being over or underused, including average monthly mileage and average number of deliveries per week.
    - on shelf availability KPIs – calculation of the time a product is physically present and available to the customer.
    - waste KPIs – measures the effectiveness of the efficiency and collection of waste.
    - quality and value KPIs – these could include customer satisfaction scores or the number of customer complaints. These help the tracking of a team's performance for meeting business objectives.
    - picking and packing KPIs – measuring operators for how many products can be picked and packed over a period, for example, 100 items picked in an hour.

- **Data management systems and tools:**
    - used for collecting and analysing large volumes of data across an organisation
    - data management tools are available for optimising the use of business resources
    - there are a number of data management systems - the more common systems include:
        - System Applications and Products in Data Processing (SAP)
        - Enterprise resource planning (ERP)
        - Warehouse management system (WMS)

- **Use of data to inform decision making:**
    - uses accurate data to provide deeper insight
    - helps to find patterns, trends and reach conclusions
    - enhances operational efficiency
    - mitigates risks
    - helps an organisation to stay ahead of their competition
    - uses data that is purposeful and useful to inform decision-making

- **Analyse data against supply chain key performance indicators:**
  - connect to the correct data sources within the organisation to pull the relevant data
  - measure the data against current KPIs

- **Identify trends and themes:**
  - analyse historical data which shows customer demand, seasonal changes and stock levels for a more accurate prediction for the coming year
  - use new product market data and determine how to plan for their journey through the supply chain
  - review KPIs in preparation for a change in demand if necessary
  - examples of historical data to help with forecasting for customer demand:
    - qualitative data for the measurement of quality and value KPIs
    - quantitative data for measuring stock levels

- **Use data analysis outcomes to inform decision making:**
  - analyse datasets to interpret patterns and trends
  - view trends and patterns of customer buying decisions
  - look at online customer reviews to form decisions
  - use on-site customer feedback to make decisions relating to storage of stock and quantities
  - resource allocation from KPI performance reviews
  - predict better future demand
  - make reasonable and logical recommendations based on data analysis
  - organisations can decide what products could be minimised or increased
  - enables organisations to share insights with stakeholders
  - historical data to predict future demand and new products to the market
  - real time data to mitigate risks and maximise opportunities

<table>
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S6 Lead and participate in problem solving activities: 5 whys, fishbone analysis</td></tr>
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<tr><td>CI1 Uses continuous improvement principles and techniques to improve performance in the supply chain (K7, S5)

CI2 Uses the outcomes of problem-solving activities to improve performance in the supply chain (K10, S6)</td><td>CI3 Justifies their solutions to problems and the positive impact they make to the business (K7, S5)</td></tr>
<tr><th colspan="2">Amplification and guidance</th></tr>
<tr><td colspan="2">The principles of continuous improvement:
identifying a need for change
analysing the current issue/problem
gaining support/driving change
implementing a solution
monitoring and refining (restarting the cycle)
Problem-solving techniques:
5 Whys – asking ‘why’ until the root cause is identified. Typically, it takes ‘5 Whys’ to get to the root cause.</td></tr>
</table>

- Six Sigma – a powerful business improvement strategy delivered through a range of methodologies and tools. The aim is to minimise errors and defects, increase customer satisfaction and reduce operational costs.
- Fishbone diagram – a cause-and-effect diagram that can help to identify possible causes of a problem and organise them into useful categories.
- Root cause analysis – identifies the cause of the problem. Trial and error is used, and solutions are tested until the right one is found.
- PESTLE analysis – political, economic, social, technological, legal and environmental factors that could affect an organisation, including the main opportunities and threats in the market.
- SWOT analysis – a method for identifying and analysing internal strengths and weaknesses, and external opportunities and threats.

- **Use continuous improvement techniques:**
  - these prioritise the elimination of waste and rely on active employee engagement to develop solutions as and when they arise, examples include:
    - Plan, Do, Check, Act (PDCA) Cycle – provides an approach for solving problems and managing change. It can test improvement measures on a small scale before updating procedures and working practices.
    - Kaizen – this approach allows many small changes which can be easier to make and have a bigger impact in the long run.
    - Gemba Walks – observation by managers of day-to-day operational activities to identify opportunities for improvement.
    - 5 Whys – involves asking why 5 times to identify the root cause of an issue.
    - 3 Ms – a lean manufacturing concept. Muri (overburden caused by poor planning), Mura (too much waste) and Muda (Idle time).
    - 5Ss – sort (organisation), set (correct place), shine (cleanliness), standardise (discipline) and sustain (on-going improvement).
    - Value stream mapping (VSM) – a lean manufacturing technique that helps to analyse, design and manage the flow of materials and information.

- **Lead and participate in problem solving activities:**
  - identify the root cause of the problem, use techniques such as:
    - the 5 Whys – repeatedly asking ‘why’ to get to the root cause
    - fishbone analysis tool to look at the cause and effect

- fact finding – asking the right questions of the right people
- obtaining feedback, ideas and suggestions from the people involved to gain a range of perspectives
- encouraging active participation by setting clear goals, and assigning roles and responsibilities
- initiate team activity sessions for questioning and word storming sessions using different techniques
- prioritise ideas
- develop and test solutions, create trials and have a ‘go live’ date
- review, replan and improve

Communication and collaboration		
Knowledge	**Skills**	**Behaviour**
K13 Limits of authority, **when to escalate tasks and issues, and to whom** **K19 Verbal communication techniques**. Giving and receiving information. **Matching style to audience. Industry terminology** **K20 Written communication techniques**. Plain English principles, Supply Chain terminology. **Report writing** **K27 Team working principles**: personality types, roles within teams, organisational hierarchies **K28 Planning and prioritising techniques**	**S8 Apply team working principles** **S9 Escalate issues and tasks** **S15 Communicate with others verbally** for example, colleagues and stakeholders **S16 Communicate in writing with others** for example, internal and external customers, colleagues, and managers **S23 Identify, organise and use resources**, including team members, to plan and complete tasks, with consideration for cost and quality	**B4 Respond and adapt to work demands and situations** **B5 Collaborate within teams**, across disciplines and with internal and external stakeholders

Project and presentation	
Pass criteria	***Distinction criteria***
CC1 Communicates data and information in a written context, suitable to the audience (K20, S16) **CC2** Uses verbal communication techniques suitable for the context, adapting style and use of terminology to suit the audience (K19, S15) **CC3** Applies team working principles, collaborating within teams and with stakeholders, to ensure project objectives are achieved (S8, K27, B5) **CC4** Responds and adapts to work demands and situations when planning and completing tasks and organising others in the team (K28, B4) **CC5** Identifies, organises and uses resources to plan and with consideration for cost, quality (S23)	***CC6*** *Justifies how they have balanced cost and quality in the planning, prioritising and completion of project tasks (K28, B4)*
Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
CC7 Explains how they have escalated issues and tasks that are beyond the limit of their authority in line with organisational procedures (K13, S9)	*No distinction criteria*

Amplification and guidance
Limits of authority: - dependent on the practitioner’s own role and responsibilities   - understanding when a problem arises or a decision needs to be made, whether this is within the limits of their own authority or, if not, understand the next steps to take   **When to escalate tasks and issues, and to whom:**   - understand the hierarchy of the organisation and who to report issues to   - refer to the company’s intranet to research policies and procedures (escalation procedure)   - ask questions before acting and ensure compliance   - understand when an issue needs escalating - some examples include: - identifying a hazard a practitioner cannot deal with - report immediately to the health and safety manager   - limitations in product knowledge and being unable to answer a customer’s question - escalate to a more experienced colleague or manager   - receiving a delivery where a sizeable percentage of the stock is damaged - report directly to the team leader for further investigation   **Verbal communication techniques:**   - positive body language   - good eye contact   - factual and clear information given face-to-face   - speaking with confidence   - active listening   - thinking before speaking   - questioning   - emphasising key points   - being mindful of the tone of voice used

- checking understanding
- using appropriate/relevant terminology when communicating with stakeholders

- **Matching style to audience. Industry terminology:**
  - adapt the tone and complexity of language to suit the specific audience
  - incorporate relevant industry terminology when talking with others in the industry
  - break down industry terminology dependant on the audience
  - avoid the use of industry jargon with customers

- **Written communication techniques:**
  - keep it simple – avoid jargon and acronyms.
  - get the point across quickly and clearly.
  - only include relevant details, stay on topic.
  - engage the reader, use the right tone.
  - proofread and edit the work ensuring correct spelling, punctuation and grammar.
  - consider the audience.
  - understand the purpose and goal of the communication – do you want the reader to act on something or are you just passing information on?

- **Report writing:**
  - conduct research, create a draft, proofread and edit
  - it may include references and a contents list
  - create an introduction, prepare an outline and arrange different sections
  - consider the audience
  - visual aids could add clarity
  - write clearly and concisely

- **Team working principles:**
  - meaningful and effective communication within the team
  - trust, accountability and transparency
  - cultivate collaboration, establishing trust and accountability
  - conflict resolution
  - clear decision-making roles enabling challenging questions
  - innovation and creativity where ideas can grow
  - active listening skills
  - understand roles and responsibilities within the team
  - understand different personalities and how to manage these – Myers Briggs tool is an effective way to understand employees' personalities

- **Planning and prioritising techniques:**
  - consider the urgency of the tasks, listing each one
  - delegate certain tasks to the team
  - set clear deadlines with clear objectives and goals
  - set realistic deadlines
  - avoid distractions and minimise interruptions
  - use scheduling tools

- **Apply team working principles:**
  - work together to solve challenges and improve processes
  - share information clearly and regularly with team members and stakeholders
  - value diverse perspectives and contributions within the team
  - take ownership of tasks and support team goals

- be flexible and open to adjusting strategies based on team feedback and changing circumstances

- **Escalate issues and tasks:**
  - involve the right person for the issue raised such as team leaders, management or HR personnel
  - know the organisation and the reporting procedures in place for escalations
  - understand limits of authority and when to escalate a problem or delegate a task

- **Communicate with others verbally:**
  - meetings – regular face-to-face or virtual meetings with teams or stakeholders
  - phone calls – quick discussions and clarifications
  - presentations – using slides or visual aids to communicate and present ideas
  - speaker (Tannoy) systems – speak clearly and articulate the message clearly
  - the most appropriate communication method should be used

- **Communicate in writing with others:**
  - email – use a subject heading and include dates and deadlines for requested tasks.
  - industry documentation – read and check the work, make sure the key details for receiving goods and returns, or processing orders, for example, are recorded. Examples include mechanical handling equipment (MHE) defect reports and risk assessments.
  - messaging apps – an efficient way to communicate promptly with internal teams in an informal manner.

- **Identify, organise and use resources** with consideration for cost and quality:
  - be knowledgeable regarding the skills within the team, enabling you to correctly and effectively allocate tasks to an individual or team
  - use a scheduling tool to allocate tasks, and set clear aims and objectives
  - consider the cost of resources for projects and aim to keep within the budget
  - resources could include the following:
    - staffing

        - equipment
        - machinery
        - training rooms
        - capital

- **Respond and adapt to work demands and situations** by:
    - managing the unexpected and being prepared
    - adapting to change and new ways of working quickly and easily
    - supporting staff with changes and reassuring them
    - keeping the team informed at each key stage
    - offering help and support to ensure targets are still achieved

- **Collaborate within teams** and with stakeholders by:
    - building trust with your team using clear and healthy communication
    - taking ownership by encouraging the team to take advantage of the tools and resources they have
    - defining expectations and responsibilities
    - leading by example by mentoring and coaching staff to develop their skills sets, and keeping everyone focused by having a shared vision
    - sharing knowledge across all teams, internal and external stakeholders
    - making projects and collaborative working activities fun

<table>
<tr><th colspan="2">Digital</th></tr>
<tr><th>Knowledge</th><th>Skills</th></tr>
<tr><td>K29 Information technology and digital: digital interfaces, email, Management Information Systems (MIS), spreadsheets, presentation, word processing, virtual communication, learning platforms, work collaboration platforms. General Data Protection Regulation (GDPR). Cyber security</td><td>S4 Use IT systems for the supply chain; Company and customer systems. Applies cyber security and GDPR regulations and policies</td></tr>
<tr><th colspan="2">Project and presentation</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>DI1 Uses IT and digital systems, complying with data protection and cyber security regulations and policies, to achieve project and organisational aims and meet client or customer needs (K29, S4)</td><td>DI2 Outlines the benefits to the business of ensuring GDPR and cyber security regulations and policies are followed (K29, S4)</td></tr>
<tr><th colspan="2">Amplification and guidance</th></tr>
<tr><td colspan="2">

Digital interfaces are a medium for which individuals interact with computers - an amalgamation of functional components, visual and auditory that people can see, hear, touch and talk as they interact
Email, spreadsheets, presentation or word processing:

software that staff can access within the business and will typically use
used to:

send and receive information and data
create reports
display graphical information
present project conclusions

</td></tr>
</table>

        - deliver training

- **Management Information Systems (MIS):**
    - used to generate data in relation to customer demand, sales performance and customer buying trends
    - enables managers to make data driven decisions, for example, inventory management, project management and promotional campaigns

- **Virtual communication** can support businesses to effectively interact with their teams, customers, suppliers and departments both internal and external

- **Learning platforms, work collaboration platforms:**
    - an online space where staff can access content and resources for learning
    - offers refresher training or related online training courses for a number of subjects such as first aid and cybersecurity
    - provides opportunities for team members to interact with other students, and share learning experiences and best practices

- **General Data Protection Regulation (GDPR). Cyber security:**
    - integrated data protection principles with a cyber security strategy is important in any business to ensure protection of assets, people and the customer data they process
    - adherence to these policies and procedures is vital while conducting any work using any platform

- **Use IT systems for the supply chain**:
    - using IT systems is part of a practitioner's day-to-day working activities - these could include:
        - emails
        - warehouse management systems
        - customer relationship management systems
        - data management systems

- **Applies cyber security and GDPR regulations and policies:**
    - lock computers when not in use
    - implement robust data protection measures such as encryption

○ obtain explicit consent before processing personal data ○ store documents in a secure location ○ use strong, unique passwords and change them regularly ○ enable two-factor authentication for added security ○ install and regularly update antivirus software

Capturing and recording of data and information	
Knowledge	**Skills**
K18 The principles of order capture and management **K25 Documentation: methods and requirements** - electronic and paper	**S14 Use order management tools** to capture customer orders **S21** Record or enter information - paper based or electronic; **risk assessments**, **handover documents**, work sheets, **checklists**, and **any legal reporting** requirements
Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
CR1 Explains how they have used order management tools to meet the needs of customers in line with organisational procedures (K18, S14) **CR2** Describes how they have recorded or entered information, for work tasks to meet the needs of clients or organisational objectives (K25, S21)	*No distinction criteria*
Amplification and guidance	
• **The principles of order capture and management:** ○ efficient order capture – creating a sales order and allocating the items from the inventory	

    - items are then prepared for shipment
    - order fulfilment – captured data is used to pick, pack and ship the items
    - order management – a digital way to manage the lifecycle/journey of an order, including:
        - order is received.
        - order is picked.
        - order is packed.
        - products are delivered.
        - measures – what could be improved?

- **Documentation: methods and requirements:**
    - ensure all documentation is completed correctly with accurate information
    - data and required information must be captured and recorded in line with requirements and regulations
    - quality checks on completion of documentation may be carried out, for example, a picker may complete an order and a method may be that a colleague checks the paperwork
    - documentation can either be paper-based or electronic
    - paper-based:
        - commercial invoices
        - picking and packing lists
        - export/import customs declarations
        - bills of lading
        - sea, air or rail waybills
        - certificates of origin
        - insurance certificates
        - purchase orders
        - mechanical handling equipment (MHE) safety check documents
        - risk assessments

        - training paperwork
    - electronic:
        - key performance indicators (KPIs) monitoring and analysing systems
        - systems for demand
        - production and resource planning
        - order capture and processing systems
        - customer systems for placing orders
        - databases/spreadsheets – create graphical information
        - systems to review orders that have been completed

- **Use order management tools:**
    - these are systems, both technological and paper-based, that ensure the principles of order capture are met. This might include inhouse software purpose built for the organisation or software purchased.
    - order management tools can help:
        - multi-channel order fulfilment and managing inventory across multiple sites
        - ensure orders are fulfilled
        - allow users to create bulk inventory lists and advertise them online
        - allow users to connect with couriers to pay for printing of shipping labels
        - allow users to sell products in multiple currencies
        - integrate e-commerce platforms and marketplaces
        - support businesses to track inventory, orders and sales for forecast demand and to optimise inventory levels

- **Risk assessments:**
    - templates – record who might be harmed, how and what actions are needed to reduce or eliminate the risk.
    - checklists – can help every area of the business. Forms can be used for generic tasks or activities, such as a Control of Substances Hazardous to Health (COSHH) form can identify potential hazards and existing control measures.

- **Handover documents:**
  - the information taken from the previous shift
  - these can be paper-based or electronic
  - they could include any:
    - health and safety issues
    - security issues
    - updates
    - staffing problems
    - key performance indicator (KPI) targets
    - incoming stock ETAs
    - planning/locations
    - any changes to systems or processes
  - the handover document could include the above agenda items and should be completed correctly and filed

- **Checklists:**
  - a document that lists the actions or procedures that are required to be followed
  - allows users to regularly evaluate for an effective and efficient logistics operation
  - this could be completed weekly, daily or monthly
  - this could include a risk assessment checklist

- **Any legal reporting** may include things such as:
  - Mechanical handling equipment (MHE) reporting defects
  - Health and safety near misses
  - Hazards identified
  - Accidents or illnesses
  - Reporting of Injuries, Diseases and Dangerous Occurrences (RIDDOR) reporting

- Electrical faults
- Fire hazards
- Control of Substances Hazardous to Health (COSHH) reporting
- Spillages

Ways of working – operations	
Knowledge	**Skills**
K15 Influences on customer and consumer demand: market trends, competitor activity and seasonality **K23 Quality assurance procedures** and monitoring processes **K26 Standard operating procedures (SOP). What they are and why they are important.** What they need to cover and why	**S1 Manage the flow of fast-moving consumer goods products or services** based on evolving and changing information **S2 Use standard operating procedures** **S19 Apply quality assurance procedures**
Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
OP1 Describes how they manage the flow of fast-moving consumer goods products or services based on evolving and changing information such as customer and consumer demand, market trends, competitor activity and seasonality (K15, S1) **OP2** Explains how they have followed Standard Operating Procedures (SOPs) to provide a service in line with company policy (K26, S2) **OP3** Explains how they have applied quality assurance procedures in order to meet organisational objectives (K23, S19)	***OP4** Explains how they have mitigated against potential issues, supporting a right first-time outcome with no back tracking, in order to meet customer needs and organisational objectives (K15, K23, S1, S19)*

Amplification and guidance
Influences on customer and consumer demand: - the influence of marketing – advertisements, posters, customer reviews, promotions, social media feedback and word of mouth on customers’ buying decisions   - seasonality – the influence of Christmas, Easter and other seasons, for example, in the spring customers will start to think about improving their gardens and/or decorating their home and will consider purchasing cleaning products and garden furniture   - weather – unseasonal weather may change a customer’s decision and particularly impacts industries such as retail, agriculture and tourism   - competitors – their behaviour and indications that they might be aware of a change in market activity such as changing prices, heavily promoting a new product or stocking a new-to-market brand   - market trends – these can impact the demand for products and services such as changes in consumer preferences, emerging technologies or economic changes   - customer factors – including income and affordability of products and related goods, behaviour and expectations   **Quality assurance procedures:**   - quality assurance procedures aim to ensure the integrity of its products or services.   - it is the method of monitoring all tasks throughout the workflow process.   - every employee is responsible for the quality of work they produce.   - quality assurance staff will ensure that products and services meet their customers’ needs and requirements, by setting clear goals, defining criteria for each task, having a risk-based approach, and implementing control measures. For example, if there has been a manufacturing issue which can frequently arise within the industry, quality assurers will monitor and help to fix the problem before they cause damage.   - the ISO9001 certification sets out the requirements for the quality assurance systems, which will enable the organisation to benchmark the quality of products and services to meet customers’ needs and requirements.   **Standard operating procedures (SOP). What they are and why they are important:**   - What they are:

    - a set of written instructions with a step-by-step guide that the team must follow for a correct and safe process.
    - adherence to the SOPs is paramount.
    - the creation of SOPs involves meeting the team responsible for that procedure, include an introduction, a step-by-step guide for the procedure and the relevant resources, with photographs or other visuals to support the procedure, correct training, supervision and guidance for your team and how each process of an SOP is conducted in the workplace.
    - they need to be reviewed and amended if there are changes within the warehouse. These could be new machinery, equipment, and new or improved IT systems and technology.
  - why they are important:
    - ensures the same level of quality and consistency for every stage of the warehouse supply chain
    - helps to reduce errors and increase health and safety awareness
    - allows for each step of a process to be quality checked and observed

- **Manage the flow of fast-moving consumer goods products or services:**
  - High volume, low margins and optimise every aspect of operations to ensure profitability.
  - Seasonal demands and fluctuations in buying behaviours.
  - Just-in-time (JIT) managing stock inventory, collaborating closely with suppliers for raw materials to arrive for scheduled production and not before that specified time.
  - Managing the shelf-life of products, the period from when products are produced until it expires (in food manufacturing or storage of products ready for despatch to the customer). There could be short dates on products whereby these products will have a quick turnaround time. Managing the areas and facilities that accommodate perishable goods, fridges, freezers, chillers, storage conditions and capacity for products.
  - ABC analysis – sorts inventory items into three categories based on their value and performance: high, medium, and low value items. The most costly and crucial items receive the highest level of management and attention.

- **Use standard operating procedures:**
  - use SOPs to improve overall supply chain productivity by encouraging the use of resources and eliminating inefficiencies

- have well defined, standardised processes and documentation which will support the identification of, for example, bottlenecks and reduce lead times
- follow the step-by-step guide within the SOP for tasks to reduce human error and minimise health and safety risks
- create an SOP and involve the correct staff who are responsible for a particular task

- **Apply quality assurance procedures:**
  - deliver training, guidance and supervision to all teams allowing understanding of quality assurance procedures and their responsibilities for undertaking their tasks correctly
  - ensure procedures for quality assurance are visible to team members, displaying target achievement and achievement of meeting standards, encouraging and motivating teams
  - emphasise the importance of adhering to established quality standards such as ISO certifications

Ways of working – planning and customer satisfaction

Knowledge	Skills
K3 Principles of supply chain efficiency in the fast-moving consumer goods industry **K30 Capacity planning techniques** **K31** Customer needs: **satisfaction considerations**, **lead times**, **service levels**	**S3 Support customers with supply chain enquiries** **S7 Use capacity planning to inform fast-moving consumer goods supply chain processes** **S11 Plan and adhere to customer lead times** **S13 Develop and implement a supply plan**, for example, supply planning, production planning, demand planning, operations planning - logistics, commercial planning

Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
PC1 Describes how they have applied planning techniques and supply chain efficiency principles to inform, develop and implement an efficient supply plan in line with task requirements and organisational procedures (K3, K30, S7, S13) **PC2** Explains how they have supported customers with enquiries, meeting lead times and service levels, in order to ensure customer satisfaction (K31, S3, S11)	***PC3*** *Justifies how they have used planning and efficiency techniques to exceed customer expectations (K3, K30, K31, S7)*
Amplification and guidance	
• **Principles of supply chain efficiency:** ○ Standard operating procedures (SOPs) – guides to follow for the journey of the product ○ Safe systems of work (SSoW)– the goods and staff are safe ○ Operational management – producing goods are services ○ Supply chain software – integrated systems supporting automation, managing warehouses, order fulfilment and to understand how everything is working ○ Collaboration – across teams, divisions and branches, for example, improving working practices ○ Demand forecasting – building a successful supply chain strategy, for example, on time in full (OTIF) and on time delivery (DOT) ○ Transportation – facilitates the flow of products, the types of transportation used ○ Logistics – efficient and cost-effective movement of goods ○ Technology – can help mitigate risks, save time and increase efficiency ○ KPI monitoring – systems/processes to monitor, manage and analyse targets ○ Customer service feedback/reviews – identify improvements ○ Continuous improvement – methodology applied to continuously improve	

- **Capacity planning techniques:**
  - resource allocation – short-term plan to review the resources available for a given project, can help with capacity planning and managing customer expectations
  - capacity forecasting – comparison of the time committed to clients against available capacity
  - creating spare capacity – a technique to ensure extra capacity is available to meet unexpected demand

- **Satisfaction considerations:**
  - orders processed and delivered without error or damage
  - delivered with care
  - packaged sufficiently
  - efficient returns policy
  - managing customer expectations of the service and products offered

- **Lead times:**
  - the time it takes to move a product from one part of the supply chain to the next, from a supplier to the customer, or it can apply to the time it takes to complete a process from beginning to end

- **Service levels:**
  - OTIF (On-time in full) – the percentage of orders delivered with the promised timeframe
  - Order accuracy, the percentage of orders delivered without errors and customer complaints

- **Support customers with supply chain enquiries:**
  - enterprise resource planning (ERP) system – used to manage inventory, track orders and handle customer service, such as answering availability queries
  - telephone contacts and numbers for customers to ask questions, with agents being able to respond quickly and resolve customer issues
  - email addresses for customers to ask questions and raise complaints

- customer service staff – knowledgeable regarding products and services, respond and react quickly, ensuring efficient problem-solving skills are applied
- customer questionnaires created online or a system within the email to raise issues and to obtain feedback
- virtual meetings to support customer issues - regular meetings will be scheduled to constantly respond to changes and improve
- apps/platforms that enable customers to ask questions, receive answers, raise queries, share feedback and act as a tracking system

- **Use capacity planning to inform fast-moving consumer goods supply chain processes:**
  - forecast your anticipated demand
  - determine required capacity
  - calculate the resource capacity of your current team
  - measure your capacity gap
  - align capacity with demand

- **Plan and adhere to customer lead times:**
  - everything will be dependent on the company's lead time
  - planned lead time – this specifies the amount of time between the start and finish of a production activity, supply chain stage or a resource
  - it is critical to plan production, transportation and material procurement
  - in some planning situations, the lead time is used to approximate the time needed to source, manufacture or receive an item
  - adherence to lead times in capacity planning is crucial - any external or internal factors that could impact these are:
    - lack of raw materials and resources
    - transport issues, breakdown or traffic incident issues
    - shortages in staff recruitment or labour
    - natural disasters, wars or conflict
    - human error

- **Develop and implement a supply plan:**
  - supply planning should demonstrate the following will be achieved:

- how goods will be sourced or manufactured
- how goods will be stored and distributed
- expected levels of demand
- coordinating supply chain activity

- production planning:
  - forecast demand accuracy
  - potential options for production
  - effective use of resources
  - assess performance
  - adjust or amend where potential issues or delays are identified
- demand planning – a supply chain management process involving:
  - prediction of future demand
  - determine the demand for each of the products
  - create a plan to meet that demand
  - products available with the right quantities and at the right time
  - reduce wastage and costs
  - improve efficiency and financial performance
- operations and commercial planning:
  - creating clear steps to meet goals
  - creating a plan which outlines tasks that are carried out daily, weekly or monthly for each department
  - reviewing operational needs, including the focus on preparation, marketing, HR, logistics and budgets
  - creating a plan to attract new business, including guidelines for achieving sales goals and objectives

<table>
<tr><th colspan="6">Environmental</th></tr>
<tr><th colspan="2">Knowledge</th><th colspan="2">Skills</th><th colspan="2">Behaviour</th></tr>
<tr><td colspan="2">K21 Impact of the sector on the environment. Efficient use of resources. Recycling, reuse, and safe disposal of waste</td><td colspan="2">S22 Comply with sustainability principles and regulations including efficient use of resources, recycling, reuse and safe disposal of waste</td><td colspan="2">B1 Consider the impact on the environment when using resources and carrying out work</td></tr>
<tr><th colspan="6">Interview underpinned by a portfolio of evidence</th></tr>
<tr><th colspan="3">Pass criteria</th><th colspan="3">Distinction criteria</th></tr>
<tr><td colspan="3">EN1 Describes how they apply the principles of environmental sustainability in their work in line with organisational procedures, regulations and standards on energy efficiency, material reuse, recycling and management of emissions and waste (K21, S22, B1)</td><td colspan="3">EN2 Explains how they have supported the development of environmental and sustainability practice in the workplace for example, through promoting good practice to others, identifying improvement to practice (K21, S22, B1)</td></tr>
<tr><th colspan="6">Amplification and guidance</th></tr>
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Impact of the sector on the environment:

emissions and commercial waste
consideration need to be made as to the mode of transport that will be used
using resources more effectively
following processes for recycling, reusing materials and how waste is disposed of to minimise the impact on the environment
continuous improvements to reduce the impact

Comply with sustainability principles and regulations:

have an awareness of sustainability regulations, such as the Environment Act
implement practices that conserve energy and water
establish and follow procedures for recycling materials where possible

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- comply with regulations for the safe disposal of waste materials
- stay informed about relevant sustainability regulations and standards
- optimise resource usage to reduce waste and increase efficiency
- promote the reuse of materials and products to extend their lifecycle

- **Consider the impact on the environment:**
  - mechanical handling equipment (MHE)/vehicle operations – emissions from gas or petrol powered vehicles.
  - packaging considerations – is it from a sustainable and ethical source, is it recyclable, and can it be re-used or re-purposed?
  - transportation – consider electric vehicles to reduce carbon footprint.
  - resources and raw materials – sourced ethically with consideration for how they are made and shipped.
  - disposal of materials, liquids or gases correctly and ethically.
  - disposal of general waste responsibly.
  - consider transportation routes, for example, to reduce traffic build up in residential areas.
  - consider noise levels around a location and other activities that could impact on the general public and wildlife.

Health and safety

Knowledge	Skills	Behaviour
K24 Methods of hazard identification and risk management	**S17 Comply with health and safety legislation, regulations**, standards, and guidance **S20** Identify and document hazards and risks in the workplace. **Apply control measures**	**B2 Prioritise health and safety**

Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
HS1 Explains how they have complied with risk assessments, method statements and safe systems of work and applied control measures in the workplace in line with organisational procedures (K24, S20) **HS2** Explains how they have prioritised health & safety in their own work, ensuring compliance with regulations, legislation and organisational procedures (S17, B2)	***HS3*** *Explains the benefits for individuals and the business of prioritising and promoting health and safety and the consequences of not doing so (S17, B2)*
Amplification and guidance	

- **Methods of hazard identification and risk management:**
  - A hazard is anything that has the potential to cause harm and a risk is the likelihood or chance of that harm occurring
  - Risk assessment for specific tasks/activities
  - Gemba walks looking at processes to identify any hazards
  - Monitoring mechanical handling equipment (MHE) near misses and accidents
  - Reporting procedures from staff or operatives
  - Promoting a culture for recording and reporting hazards to mitigate risks
  - Observing an activity and noting the potential to cause harm
  - Changes to processes to reduce the risks
  - Review equipment, machinery and vehicles for defects or faults that could occur and cause harm - put adequate safety checks in place to reduce the risks
  - Ongoing review of risks

- **Comply with health and safety legislation, regulations:**
  - know current key health and safety legislation and how to comply, such as the Health and Safety at Work etc. Act

- be familiar with specific regulations relevant to the supply chain, such as Lifting Operations and Lifting Equipment Regulations (LOLER) and Control of Substances Hazardous to Health Regulations (COSHH)
- identify potential hazards in the workplace and assess the risks associated with them
- follow the guidelines and standards set by organisations
- implement best practices for workplace safety as recommended by industry standards

- **Apply control measures:**
  - control measures are implemented where hazards have been identified to lower the level of risk
  - following the Hierarchy of Control these are: elimination, substitution, engineering controls, administration controls, personal protective equipment (PPE)
  - complete a risk assessment - the steps needed to manage a risk are:
    - identify the hazard
    - assess the risk (low, medium or high)
    - control the risk
    - record your findings
    - review the controls

- **Prioritise health and safety** by:
  - ensuring all working practices are safe – safe systems of work (SSoW) and standard operating procedures (SOPs)
  - implementing a 'Clean as You Go' Policy with easy access for disposal of waste materials and debris
  - completing adequate health and safety guidance and training
  - taking responsibility for health and safety
  - recording near misses
  - creating a positive and responsible culture to health and safety in the workplace
  - incorporating health and safety within each team meeting and handover

<table>
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<tr><th colspan="2">Knowledge</th><th colspan="2">Skills</th><th colspan="2">Behaviour</th></tr>
<tr><td colspan="2">K22 Principles of equity, diversity, and inclusion in the workplace</td><td colspan="2">S18 Follow equity, diversity, and inclusion principles</td><td colspan="2">B3 Contributes to equity, diversity, and inclusivity in the workplace</td></tr>
<tr><th colspan="6">Interview underpinned by a portfolio of evidence</th></tr>
<tr><th colspan="3">Pass criteria</th><th colspan="3">Distinction criteria</th></tr>
<tr><td colspan="3">ED1 Describes how they follow and contribute to equity, diversity and inclusion principles and legislative guidelines in their team (K22, S18, B3)</td><td colspan="3">ED2 Justifies how their commitment to equity, diversity and inclusion extends to and impacts wider teams or stakeholders (K22, S18, B3)</td></tr>
<tr><th colspan="6">Amplification and guidance</th></tr>
<tr><td colspan="6">

Principles of equity, diversity, and inclusion:

equity is achieved by being fair and impartial, offering equal access and opportunity to all workers
diversity recognises and places value on people’s differences, ensuring fair representation
inclusion is achieved by creating an environment where everyone feels welcome and can contribute
principles include:

fairness and respect among all staff
social justice
human rights
equal access to opportunities regardless of beliefs, background or lifestyle
openness to diversity – value differences in the workplace
inclusion allows positive engagement
equality enables delivery of fair outcomes

</td></tr>
</table>

- **Follow equity, diversity, and inclusion principles:**
  - embrace and celebrate differences within the workplace
  - treat all colleagues and peers equally and with respect
  - create a culture of acceptance and understanding
  - attend online courses to raise awareness
  - hold sessions to allow employees to raise queries and ask questions
  - have a suggestion box
  - be aware of unconscious bias
  - liaise and support charitable organisations
  - incorporate EDI in advertising campaigns to promote an inclusive workplace

- **Contributes to equity, diversity, and inclusivity** by:
  - being sensitive and considerate to different cultures
  - leading by example to other employees
  - sharing best practice
  - using inclusive language
  - following relevant legislation

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Assessment summary

The end-point assessment for the Supply Chain Practitioner apprenticeship standard is made up of 3 assessment methods:

1. A multiple-choice test consisting of **30 multiple-choice questions** of **60-minute** duration
2. A **3000-word** project report and **45-minute** presentation with questions
3. A **60-minute** interview underpinned by a portfolio of evidence

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

Each component of the end-point assessment will be assessed against the appropriate criteria laid out in this kit, which will be used to determine a grade for each individual. The grade will be determined using the combined grades.

Multiple-choice test

All assessment methods are weighted equally. The multiple-choice test is graded at pass only. Total marks available are 30.

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

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

Project and presentation

All assessment methods are weighted equally. Apprentices will be marked against the pass and distinction criteria outlined in this kit.

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will not have achieved all of the pass criteria

The presentation should be conducted in a suitable location such as an employer's or training provider's premises. It may also be conducted using technology.

Interview underpinned by a portfolio of evidence

All assessment methods are weighted equally. Apprentices will be marked against the pass and distinction criteria outlined in this kit.

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will not have achieved all of the pass criteria

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

Grading

The apprenticeship includes pass and distinction grades, with the final grade based on the apprentice's combined performance in each assessment method.

To achieve a pass, the apprentice is required to pass each of the 3 assessment methods.

To achieve a distinction, the apprentice must achieve a distinction in the project and presentation and the interview underpinned by a portfolio of evidence.

The overall grade for the apprentice is determined using the matrix below:

Multiple-choice test	Project and presentation	Interview underpinned by a portfolio of evidence	Overall grade awarded
Fail	Fail	Fail	**Fail**
Fail	Pass	Pass	**Fail**
Pass	Fail	Pass	**Fail**
Pass	Pass	Fail	**Fail**
Pass	Pass	Pass	**Pass**
Pass	Pass	Distinction	**Pass**
Pass	Distinction	Pass	**Pass**
Pass	Distinction	Distinction	**Distinction**

Retake and resit information

If the apprentice fails 1 assessment method or more, they can take a resit or a retake at their employer's discretion. The apprentice's employer needs to agree that a resit or retake is appropriate. If a resit is chosen, please call the Highfield scheduling team to arrange the resit. If a retake is chosen, the apprentice will require a period of further learning and will need to complete a retake checklist. Once this is completed, please call the Highfield scheduling team to arrange the retake.

A resit is typically taken within **2 months** of the EPA outcome notification. The timescale for a retake will be dependent on how much retraining is required but is typically taken within **4 months** of the EPA outcome notification.

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

Any EPA component resit/retake must be taken within **6 months** of the EPA outcome notification, otherwise the entire EPA must be retaken in full. Apprentices should have a supportive action plan to prepare for the resit/retake.

Apprentices who achieve a pass grade cannot resit or retake the EPA to achieve a higher grade.

Where any assessment method has to be resat or retaken, the apprentice will be awarded a maximum grade of pass, unless there are exceptional circumstances that are beyond the control of the apprentice as determined by Highfield.

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Assessing the multiple-choice test

The test consists of **30 multiple-choice questions** and will last **60 minutes**. The **pass** mark is **18 out of 30**.

The apprentice must be given at least 2 weeks' notice of the date and time of the test.

The multiple-choice test may be delivered online or be paper-based and should be taken in a 'controlled' and invigilated environment. The test is closed book which means that the apprentice cannot refer to reference books or materials.

During the test, dictionaries should be allowed where requested.

Before the assessment

The employer/training provider should:

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

Multiple-choice test criteria

Multiple-choice test
K1 Characteristics and processes of the end-to-end fast-moving consumer goods supply chain
K4 Legislation and policies that influence the supply chain
K5 The characteristics and specific needs of different customer groups, for example, Major Multiples, Wholesalers, Convenience, Value Retailers, Discounters, Ecommerce
K8 The principles of commercial and cost efficiencies in supply chain
K9 Types of logistics costs and their components, for example, Transportation costs, Inventory costs, Labour costs, Customer service costs, Storage costs, Administration costs
K11 The principles of capacity planning including, rough cut, resource requirement, capacity requirement, warehouse capacity, hauliers, logistics and resources
K12 The principles of strategic and operational decision making
K14 The principles of forecasting
K17 Factors that impact on supply chain planning: capacity, product life, for example, customer requirements - exclusive range or NPD, producing factory location, co- manufacturing, promo cycles, sustainability
K32 Awareness of health and safety regulations, standards, and guidance and impact on role. Control of Substances Hazardous to Health (CoSHH). Fire safety. Hazards and risks. Health and Safety at Work Act. Isolation and emergency stop procedures. Manual handling. Personal Protective Equipment (PPE). Safety equipment: guards, signage, fire extinguishers. Safety signage. Situational awareness. Slips, trips, and falls. Working in confined spaces. Working at height

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Assessing the project and presentation

A project involves the apprentice completing a significant and defined piece of work that has a real business application and benefit. The project must meet the needs of the employer's business and be relevant to the apprentice's occupation and apprenticeship.

This end-point assessment method consists of 2 components:

- project with a project output
- presentation with questions and answers

The workplace project is a piece of work that will allow the apprentice to plan, implement and present an individual workplace project. The workplace project should be conducted as part of an apprentice's normal work during the end-point assessment period. Employers will agree and approve the scope of the workplace project based on their current job role.

It is recommended that the project is focused on either a process review or a specific issue. The project should require the apprentice, as a minimum to:

- identify a supply chain process or issue
- analyse data about the process or issue
- lead and participate in problem-solving activities
- use the outcomes of data analysis and problem-solving activities to make informed decisions or solutions for the process or issue
- create a proposed solution for the process or issue

The apprentice may work as part of a team to complete the project, which could include internal colleagues or technical experts. The apprentice must, however, complete their project report and presentation unaided and they must be reflective of their own role and contribution. The apprentice and their employer must confirm this when the report and any presentation materials are submitted.

The employer should ensure the apprentice has the time and resources, within the project period, to plan and complete their project.

The project starts after the apprentice has gone through gateway and the title and scope have been approved by Highfield.

Component 1: Project report

The project outcome should be in the form of a written report where the apprentice will present evidence from their real work that illustrates their application of the knowledge, skills and behaviours.

The report must include at least:

- an executive summary (or abstract)
- an introduction

- the scope of the project (including key performance indicators, aims and objectives)
- a project plan
- research outcomes
- data analysis outcomes
- project outcomes
- discussion of findings
- recommendations and conclusions
- references
- appendix containing mapping of KSBs to the report

The report must have a word count of **3,000 words** (+/- 10%) and appendices, references and diagrams will not be included in this total. End-point assessors will only mark reports up to **3300 words**, at which point, assessors will stop marking and only credit the criteria covered to that point. Reports that fall short of the word count will be marked in full, against all criteria. The assessor will review and assess the project report in advance of the presentation with questions.

The apprentice must produce and include a mapping of KSBs in an appendix, showing how the report evidences the KSBs mapped to this assessment method. The **project mapping document** is available to download from the Highfield Assessment website

The report must be uploaded in PDF format and must be accompanied by the **written submission sheet** which is available to download from the Highfield Assessment website. On the written submission sheet, the apprentice and their employer must verify that the submitted report is the apprentice's own work.

Component 2: Presentation with questions

The apprentice must prepare and deliver a presentation to an assessor. After the presentation, the assessor must ask the apprentice questions about their project, report and presentation.

The apprentice must be given at least 2 weeks' notice of the presentation with questions.

The presentation should cover:

- an overview of the project
- the project scope (including key performance indicators)
- summary of actions undertaken by the apprentice
- project outcomes and how these were achieved

Any presentation materials must be submitted with the completed project report by the end of week 10 of the EPA period. The apprentice must notify Highfield, at that point, of any technical requirements for the presentation. The presentation with questions must take place in a suitable venue, for example, at the employer's premises. It should take place in a quiet room, free from distractions and influence. The presentation with questions can be conducted by video conferencing.

The presentation and questioning must last **45 minutes**, typically including a **15-minute** presentation followed by **30 minutes** of questioning, where the end-point assessor will ask a minimum of **6 questions**. The end-point assessor has the discretion to increase the time of the presentation by up to 10% to allow the apprentice to complete their last point or respond to a question.

During the presentation, the apprentice will need to have access to the following as required:

- audio-visual presentation equipment
- flip chart and writing and drawing materials
- computer

Before the assessment

Employers/training providers should:

- give the apprentice time to work on their project and report during the end-point assessment window
- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which supply chain practitioner criteria will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard and identify real-life examples
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

Grading the project and presentation

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages (under project and presentation criteria).

- To achieve a **pass**, apprentices must meet all of the pass criteria
- To achieve a **distinction**, apprentices must meet all of the pass **and** distinction criteria

Project and presentation mock assessment

It is suggested that a mock assessment is carried out by the apprentice in advance of the end-point assessment with the training provider/employer giving feedback on any areas for improvement. It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment and Highfield recommend that the apprentice experiences a mock presentation in preparation for the real thing. The most appropriate form of mock assessment will depend on the apprentice's setting and the resources available at the time.

When planning a mock assessment, the employer/training provider should include the following elements:

- mock presentations should be **45 minutes**, typically with the presentation lasting **15 minutes** followed by **30 minutes** of questioning
- consider a recording of the mock assessment and allow it to be played back to other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience
- mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose
- structured, 'open' questions should be used as part of the Q&A that do not lead the candidate but allow them to express their knowledge in a calm and comfortable manner. Some examples of this may include the following:
    - data analysis
        - When and why you have amended your approach to the analysis process?
        - Tell me how you have analysed supply chain data to identify trends or themes.
    - continuous improvement
        - Which continuous improvement techniques have you used in your role?
    - communication and collaboration
        - In what ways have you had to adapt your communication style to suit the audience?
        - How do you ensure that you are effectively collaborating with the team on projects?
    - digital
        - How do you comply with data protection regulations when using digital systems?

Project and presentation criteria

Throughout the project and presentation, the assessor will review the apprentice's competence in the criteria outlined below.

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

Data analysis
To pass, the following must be evidenced.
DA1 Analyses supply chain data, derived from data management systems, tools and key performance indicators, to identify trends or themes that affect the fast-moving consumer goods supply chain (K2, K6, S10) **DA2** Applies the principles of root cause analysis and problem solving techniques to lead on and carry out problem solving activities in line with task requirements (K16, S12)
To gain a distinction, the following must be evidenced.
DA3 *Reflects and amends their approach during the analysis process, based on trends and themes they have identified to refine approach and ensure outcomes best support and inform the project scope (K2, K6, K16, S10, S12)*

Continuous improvement
To pass, the following must be evidenced.
CI1 Uses continuous improvement principles and techniques to improve performance in the supply chain (K7, S5) **CI2** Uses the outcomes of problem-solving activities to improve performance in the supply chain (K10, S6)
To gain a distinction, the following must be evidenced.
CI3 *Justifies their solutions to problems and the positive impact they make to the business (K7, S5)*

Communication and collaboration
To pass, the following must be evidenced.
CC1 Communicates data and information in a written context, suitable to the audience (K20, S16) **CC2** Uses verbal communication techniques suitable for the context, adapting style and use of terminology to suit the audience (K19, S15) **CC3** Applies team working principles, collaborating within teams and with stakeholders, to ensure project objectives are achieved (S8, K27, B5) **CC4** Responds and adapts to work demands and situations when planning and completing tasks and organising others in the team (K28, B4) **CC5** Identifies, organises and uses resources to plan and with consideration for cost, quality (S23)
To gain a distinction, the following must be evidenced.
***CC6** Justifies how they have balanced cost and quality in the planning, prioritising and completion of project tasks (K28, B4)*

Digital
To pass, the following must be evidenced.
DI1 Uses IT and digital systems, complying with data protection and cyber security regulations and policies, to achieve project and organisational aims and meet client or customer needs (K29, S4)
To gain a distinction, the following must be evidenced.
***DI2** Outlines the benefits to the business of ensuring GDPR and cyber security regulations and policies are followed (K29, S4)*

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Assessing the interview underpinned by a portfolio of evidence

In the interview underpinned by a portfolio of evidence, the assessor will ask the apprentice questions to assess their competence against the relevant criteria outlined in this kit.

The apprentice must have access to their portfolio of evidence during the interview. Apprentices can refer to and illustrate their answers with evidence from their portfolio of evidence during the interview. However, the portfolio of evidence is not directly assessed.

Highfield must give an apprentice 2 weeks' notice of the interview. The interview must take place in a suitable venue, for example, at the employer's premises. The interview should take place in a quiet room, free from distractions and influence. The interview can be conducted by video conferencing.

It must last for **60 minutes**. The independent assessor can increase the time of the interview by up to 10% to allow the apprentice to respond to a question if necessary.

The assessor will ask **at least 6 questions**. Follow-up questions are allowed where clarification is required.

Before the assessment

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which supply chain practitioner criteria will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

Grading the interview underpinned by a portfolio of evidence

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages (under 'Interview underpinned by a portfolio of evidence criteria').

- To achieve a **pass**, apprentices must achieve all of the pass criteria

- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will have not achieved all of the pass criteria

Interview underpinned by a portfolio of evidence mock assessment

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment. Highfield recommends that the apprentice experiences a mock interview underpinned by a portfolio of evidence in preparation for the real thing. The most appropriate form of mock interview underpinned by a portfolio of evidence will depend on the apprentice's setting and the resources available at the time.

In designing a mock assessment, the employer/training provider should include the following elements in its planning:

- the mock interview underpinned by a portfolio of evidence should take place in a suitable location.
- a 60-minute time slot should be available to complete the interview discussion underpinned by a portfolio of evidence, if it is intended to be a complete interview covering all relevant standards. However, this time may be split up to allow for progressive learning.
- consider a video or audio recording of the mock interview underpinned by a portfolio of evidence and allow it to be available to other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice.
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.
- use structured, 'open' questions that do not lead the apprentice but allows them to express their knowledge and experience in a calm and comfortable manner. For example:
    - capturing and recording of data and information
        - Can you tell me about a time when you have recorded information for work tasks to meet the needs of clients?
    - ways of working – operations
        - How do you follow standard operating procedures (SOPs)?
    - ways of working – planning and customer satisfaction
        - What planning techniques have you used to exceed customer expectations?
    - environmental

        - Tell me how you have supported the development of sustainability practices in the workplace.
    - health and safety
        - How do you prioritise health and safety in your own work?
    - equity, diversity and inclusion
        - How do you follow and contribute to diversity and inclusion principles in the team?

Interview underpinned by a portfolio of evidence criteria

Throughout the **60-minute** interview underpinned by a portfolio of evidence, the assessor will review the apprentice's competence in the criteria outlined below.

Apprentices should prepare for the interview underpinned by a portfolio of evidence by considering how the criteria can be met.

Communication and collaboration
To pass, the following must be evidenced.
CC7 Explains how they have escalated issues and tasks that are beyond the limit of their authority in line with organisational procedures (K13, S9)
To gain a distinction, the following must be evidenced.
No distinction criteria

Capturing and recording of data and information
To pass, the following must be evidenced.
CR1 Explains how they have used order management tools to meet the needs of customers in line with organisational procedures (K18, S14) **CR2** Describes how they have recorded or entered information, for work tasks to meet the needs of clients or organisational objectives (K25, S21)
To gain a distinction, the following must be evidenced.
No distinction criteria

Ways of working – operations
To pass, the following must be evidenced.
OP1 Describes how they manage the flow of fast-moving consumer goods products or services based on evolving and changing information such as customer and consumer demand, market trends, competitor activity and seasonality (K15, S1)

Ways of working – operations
To pass, the following must be evidenced.
OP2 Explains how they have followed Standard Operating Procedures (SOPs) to provide a service in line with company policy (K26, S2) **OP3** Explains how they have applied quality assurance procedures in order to meet organisational objectives (K23, S19)
To gain a distinction, the following must be evidenced.
***OP4** Explains how they have mitigated against potential issues, supporting a right first time outcome with no back tracking, in order to meet customer needs and organisational objectives (K15, K23, S1, S19)*

Ways of working – planning and customer satisfaction
To pass, the following must be evidenced.
PC1 Describes how they have applied planning techniques and supply chain efficiency principles to inform, develop and implement an efficient supply plan in line with task requirements and organisational procedures (K3, K30, S7, S13) **PC2** Explains how they have supported customers with enquiries, meeting lead times and service levels, in order to ensure customer satisfaction (K31, S3, S11)
To gain a distinction, the following must be evidenced.
***PC3** Justifies how they have used planning and efficiency techniques to exceed customer expectations (K3, K30, K31, S7)*

Environmental
To pass, the following must be evidenced.
EN1 Describes how they apply the principles of environmental sustainability in their work in line with organisational procedures, regulations and standards on energy efficiency, material reuse, recycling and management of emissions and waste (K21, S22, B1)
To gain a distinction, the following must be evidenced.
***EN2** Explains how they have supported the development of environmental and sustainability practice in the workplace for example, through promoting good practice to others, identifying improvement to practice (K21, S22, B1)*

Health and safety
To pass, the following must be evidenced.
HS1 Explains how they have complied with risk assessments, method statements and safe systems of work and applied control measures in the workplace in line with organisational procedures (K24, S20) **HS2** Explains how they have prioritised health & safety in their own work, ensuring compliance with regulations, legislation and organisational procedures (S17, B2)
To gain a distinction, the following must be evidenced.
HS3 *Explains the benefits for individuals and the business of prioritising and promoting health and safety and the consequences of not doing so (S17, B2)*

Equity, diversity and inclusion
To pass, the following must be evidenced.
ED1 Describes how they follow and contribute to equity, diversity and inclusion principles and legislative guidelines in their team (K22, S18, B3)
To gain a distinction, the following must be evidenced.
ED2 *Justifies how their commitment to equity, diversity and inclusion extends to and impacts wider teams or stakeholders (K22, S18, B3)*

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