

What's this document? We have reviewed the latest apprenticeship standards and compared these to our online courses to identify where each covers some, or all, of the knowledge, skills and understanding required. This document shows which courses map to which topics. You can find more details about our course catalogue on our website www.upskillpeople.com

Standard: Retailer (level 2)

Applicable e-learning courses from Upskill People see: www.upskillpeople.com/products

Criteria/Topic	Knowledge and Understanding (Know it)	Skills (Show it)	e-Learning Course Notes	Welcome to Retail	Retail Induction Series	Sales and Service Essentials	Sales and Service Essentials Compact	Sales and Service Challenge - Level 1	Clear Communication	Equality Essentials	Serving Customers with Hearing Loss	Security Essentials	Managing Stock	Fresh Produce	Visual Merchandising Skills	Effective Merchandising	Food Hygiene Essentials	Health and Safety Essentials	Health and Safety Plus	Fire Safety Essentials	Consumer Law and Food Safety	PCI Essentials	Data Security and Protection Essentials	General Security Awareness Training	Asbestos Awareness	Challenge 25 Alcohol Sales	Alcohol Plus	Challenge 25 Tobacco Sales	Age Restricted Sales	Fuel Safety Essentials	Forecourt Competent Person	Adult Gaming Centres	PCI Essentials																																								
<p>In order to pass all apprentices will demonstrate ALL of the following during the observation:</p> <ul style="list-style-type: none"> Make every interaction with a customer an opportunity to increase, gain, maintain or re-establish their loyalty Clearly communicate accurate, relevant and helpful information to customers, checking their understanding Deliver excellent customer service in line with the business' culture and values in all activities Ask appropriate questions in order to help customers Shows a genuine interest in customer service which clearly demonstrates understanding of how own behaviour will influence customers' opinion of the business, their purchasing decision, and ultimately overall profitability Present the culture of the organisation through own personal presentation and interaction with customers 																																																																									
Customer	Know the customer profile of the business, appropriate methods for communicating with customers e.g. face to face and remotely, what customers' purchasing habits are, how to support and increase sales, encourage customer loyalty and achieve repeat business	Positively interact with customers, using business relevant methods for example face to face or on-line, to support and increase sales by providing useful information and service	Sales and Service Essentials Compact version for small retailers	✓	✓	✓	✓	✓																																																																	
<ul style="list-style-type: none"> Interact with customers and build a rapport in a way that demonstrates an understanding of the business vision, objectives and brand standards Use service techniques and procedures that deliver the brand standards Carry out all activities in a manner that promotes the value of the business brand standards to customers, team members and other stakeholders (e.g. suppliers) 																																																																									
Business	Know the vision, objectives and brand standards of the business and how to contribute towards their success	Establish a good rapport with customers, serve them in line with brand standards and promote the values of the business in all work activities	Introductory knowledge and the majority of the business core elements can be covered by the Retail Induction courses. This series is designed to be tailored for the company (covering specific company brand, services, policies, procedures). Alternatively the Welcome to Retail requires no tailoring	✓	✓																																																																				
<ul style="list-style-type: none"> Communicate with an awareness of the situation, adapting it as necessary, and responding appropriately Support customer interactions by adapting body language and tone to the person / people being served 																																																																									
Communications	Know how to identify and determine individuals' situation and needs and how to respond in the most appropriate way in line with the business culture (for example the difference in how a branded goods retailer would communicate to their customers would be very different from an individual that retails a funeral service, or someone that needs to convey highly technical product information)	Use effective methods of communication that achieve the desired result, according to the purchasing process e.g. face to face, via the telephone or on-line				✓	✓	✓	✓																																																																
<ul style="list-style-type: none"> Uphold and personally demonstrate a positive brand and business reputation at all times 																																																																									
Brand reputation	Know and understand the importance of brand and business reputation and what can affect it	Respond to situations that threaten brand and business reputation in line with company policy and alert the relevant person if a threat is identified	Option of tailored Retail Induction courses	✓	✓																																																																				
<p>In order to pass all apprentices will demonstrate a representative sample of the following in the on-demand test:</p> <ul style="list-style-type: none"> General principles of operating commercially in the retail environment What costs are (the cost of all resources including for example: stock, packaging items, stationary, time, etc.) How a different approach to just one process that does not affect great customer service can save the business money (e.g. the use packaging material) Key performance indicators that support the profitability of the business The sales targets for the business and how businesses aim to reduce waste Where and when wastage can occur and how to minimise it (e.g. reducing the rate of returned goods) Techniques and opportunities for increasing sales in the business at the lowest cost (e.g. time invested into achieving the sale) 																																																																									
Financial	Understand the principles of operating commercially and supporting the overall financial performance of the business for example by aiming to exceed targeted sales and reduce wastage and returns	Deliver a sales service that meets customers' needs and balances the financial performance of the business for example working towards sales targets, following procedures relating to packing of goods and dealing with returned products	Security Essentials covers financial loss from theft, Managing Stock and Fresh Produce for reducing wastage and increasing sales. Option to create bespoke courses for client specific approach to costs and KPIs supporting profitability	✓	✓	✓	✓						✓	✓	✓																																																										
<ul style="list-style-type: none"> Why excellent communication is so important to businesses The impact on businesses of poor or inappropriate communication The impact of body language in communication The importance of non-judgemental listening in the communication process A variety of communication methods to deal with different situations 																																																																									
Communications	Know how to identify and determine individuals' situation and needs and how to respond in the most appropriate way in line with the business culture (for example the difference in how a branded goods retailer would communicate to their customers would be very different from an individual that retails a funeral service, or someone that needs to convey highly technical product information)	Use effective methods of communication that achieve the desired result, according to the purchasing process e.g. face to face, via the telephone or on-line				✓	✓	✓	✓																																																																
<ul style="list-style-type: none"> The link between brand reputation and business success Understand how conduct both during and out of working hours can impact on brand and business reputation (including use of social media) Recognise how own actions impact on brand reputation both positively and negatively 																																																																									
Brand reputation	Know and understand the importance of brand and business reputation and what can affect it	Respond to situations that threaten brand and business reputation in line with company policy and alert the relevant person if a threat is identified	Option of tailored Retail Induction courses	✓	✓																																																																				
<ul style="list-style-type: none"> Recognise the importance of window and store displays in translating brand or business identity to customers The implications of misrepresentation of or damage to the product through excessive alteration in merchandising How merchandising can support the sales process 																																																																									
Merchandising	Understand how increase sales through product placement by utilising hot spots' and recognising the relationship between sales and space	Actively use techniques to optimise sales through effective product placement, ensuring product displays remain attractive, appealing and safe to customers													✓	✓	✓																																																								
<ul style="list-style-type: none"> Recognise the importance of ensuring the right level of stock in the business, stock control and understand the implications of poor stock control in the business How to keep accurate stock records and why this is important to ensuring the right levels of stock are maintained Why security is important when storing stock 																																																																									
Stock	Know how to maintain appropriate levels of the right stock to meet customer demand, taking into account planned marketing activities and expected seasonal variations and the conditions they must be stored in	Maintain appropriate levels of the right stock to meet customer demand, ensure it is kept in the correct condition (for example correct temperature, environment, packaging), and minimise stock loss through accurate administration, minimising wastage and theft											✓	✓	✓	✓	✓																																																								
<ul style="list-style-type: none"> What 'business positioning' is and how it relates to market share and competitors What a unique selling point is, how businesses benefit from them What a promotions and advertising campaign is and why businesses use them How methods used for promotion impact on the customer's purchasing decision The importance of being aware of local competitors and their offers What a strapline is and how it is used 																																																																									
Marketing	Know how the business positions itself in order to increase its market share and compete against its main competitors for example its unique selling points, its straplines, promotions and advertising campaigns	Influence customers' purchasing decisions by providing accurate guidance on product and price comparisons and sharing knowledge on local offers and variances	Option of tailored Retail Induction courses. Option to create bespoke courses for client specific marketing approach	✓	✓	✓	✓								✓	✓																																																									
<ul style="list-style-type: none"> How consumer legislation protects the rights of customers How consumers are protected from unfair trading practices The main requirements of consumer credit, data protection, weights and measures, licensing and age-related legislation, how they protect consumers and how they impact the business The main requirements of legislation in relation to health, safety, security and confidentiality How to identify and assess risks to health, safety and security How to work safely and how to deal with risks, accidents and emergencies The legal and commercial implications to the business of contravening legislation Own role and responsibilities in relation to complying with legal requirements 																																																																									
Legal and governance	Recognise and understand legislative responsibilities relating to the business and the products and/or services being sold (for example the importance of food safety for food retailers), the importance of protecting peoples' health, safety and security, and the consequences of not following legal guidelines	Comply with legal requirements to minimise risk and inspire customer confidence; minimising disruption to the business and maintaining the safety and security of people at all times		✓	✓													✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓																																					

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Standard: Team Leader (level 3)

Applicable e-learning courses from Upskill People see: www.upskillpeople.com/products

Criteria/Topic	Knowledge and Understanding (Know it)	Skills (Show it)	e-Learning Course Notes	Welcome to Retail	Retail Induction Series	Sales and Service Essentials Compact	Sales and Service Essentials Challenge - Level 1	Clear Communication	Equality for Managers	Serving Customers with Hearing Loss	Security Essentials	Managing Stock	Fresh Produce	Visual Merchandising Skills	Effective Merchandising	Food Hygiene Essentials	Managing Food Hygiene	Health and Safety Essentials	Health and Safety Plus	Managing Health and Safety	Fire Safety Essentials	Consumer Law and Food Safety	PCI Essentials	Data Security and Protection Essentials	General Security Awareness Training	Asbestos Awareness	Challenge 25 Alcohol Sales	Alcohol Plus	Challenge 25 Tobacco Sales	Age Restricted Sales	Four Safety Essentials	Forecourt Competent Person	Adult Gaming Centres	Managing People - Preparation	Managing People - Wellbeing	Managing People - Induction	Managing People - Coaching & Performance Management			
Customer	Understand the customer profile of the business, their purchasing habits across a retail calendar year and how to meet and exceed their needs. Know the best ways to drive the team to increase sales, secure customer loyalty and attain business targets	Monitor customers' enquiries and service requirements; coach and support team members to use appropriate methods, e.g. face to face or remote such as on-line facilities, to deliver consistent and exceptional service that provides customers with a positive experience		✓	✓	✓	✓	✓																																
Business	Understand the purpose of the business including its vision, objectives and brand/business standards, how they compare to its competitors and how own role, and the team, help to achieve them	Work with the team to maintain brand/business standards at all times and identify and address any potential risks according to business procedures	Majority of the business element can be covered by the Retail Induction courses. This series is designed to be tailored for the company (covering specific company brand, services, vision, objectives, roles/teams). Alternatively the Welcome to Retail requires no tailoring - more simple overview of retail	✓	✓																																			
Leadership	Understand how to organise the team on a daily basis to achieve objectives, and recognise the importance of contingency planning to meet business requirements; know limits of authority when deputising for line manager	Use available information to coordinate the work of the team so that the right people and resources are in the right place at the right time to ensure consistent brand/business standards are delivered. Deputise for line manager within limits of own authority																																						
Marketing	Understand how the brand/business is positioned externally, particularly in relation to local and online competitors and how its products/services meet consumer trends. Understand how own actions, and those of the team, can impact on customers' perception of the brand/business	Support the team to ensure they understand and engage in the marketing activities and plans of the business and help ensure that customers have the best possible experience	Option of tailored Retail Induction courses	✓	✓																																			
Sales and promotion	Understand the factors which can determine and affect sales and promotions throughout the retail year and how to coordinate and implement them to support business objectives	Communicate sales targets to the team and support them, recognising and acting on opportunities to maximise revenue, for example through link selling and drawing customers' attention to promotional offers		✓	✓	✓	✓	✓				✓	✓	✓	✓																									
Product and service	Know and promote the features and benefits of products/services, their unique selling points, the skills required to sell them, where items fit into product ranges, associated products and services, where to find detailed information if required and other relevant information such as delivery lead time, accessibility and source	Maximise opportunities to increase sales by ensuring team know and understand the features, benefits, unique selling points and other relevant information relating to products, product ranges and services offered by the business		✓	✓	✓	✓	✓				✓	✓	✓	✓																									
Technology	Understand how current and emerging technologies support retail operations and sales whether customer facing or remote, and how best to operate them to achieve an efficient and effective service	Oversee the appropriate use of technology in line with business policy and follow the appropriate procedures to deal with service issues		✓	✓																																			
In order to pass all apprentices will demonstrate knowledge and understanding of a proportional sample of the following in the on demand test:																																								
	<ul style="list-style-type: none"> Principles of establishing, monitoring and reviewing sales targets Key costs for a retail team, including fixed and variable, stock, staff and overheads Turnover, gross and net profit Ways to minimise costs and wastage VAT 																																							
Financial	Understand how own actions and those of the team can contribute to the overall financial performance of the business by increasing sales, e.g. through product positioning and minimising costs through effective stock control and prevention of theft	Support the achievement of financial targets by planning and monitoring resources. Use resources effectively and efficiently to meet expected demand. Oversee the areas that impact on financial performance in own area of the business in line with business procedures	Security Essentials covers financial loss from theft, Managing Stock and Fresh Produce for reducing wastage and increasing sales. Option to create bespoke courses for client specific approach to costs, sales targets, resourcing	✓	✓	✓	✓				✓	✓	✓																											
	<ul style="list-style-type: none"> The variety of methods of communication available and how to use those effectively depending on the situation and audience Verbal/non-verbal/written, face to face, on-line, via telephone, brand standard/corporate image How to establish the needs of individuals (team members and customers) Principles of active listening The importance of feedback 																																							
Communication	Understand how to support effective communication, quickly determining the situation and needs of individuals and how to respond in the most appropriate way using a variety of techniques and methods, for example face to face and/or remotely to include on-line	Adapt style of communication according to the audience, monitor the effectiveness of and encourage excellent communications across all operations that achieve the best result for the business including verbal, written and on-line communications				✓	✓	✓	✓	✓																														
	<ul style="list-style-type: none"> Key principles of the retail calendar Principles of merchandising How local needs can influence merchandising The importance of following merchandising plans 																																							
Merchandising	Know methods of merchandising throughout the retail operation, including point of sale, the retail calendar and local needs e.g. geographical, topical or weather based	Ensure team replenish and maintain merchandising according to business requirements, the retail calendar and local needs e.g. geographical, topical or weather based										✓	✓	✓	✓																									
	<ul style="list-style-type: none"> The principles of stock control The stock journey, from supply to sale Why storage conditions are important for effective stock control How to manage stock levels Legal requirements relating to stock control, movement and sale (e.g. age restricted, fireworks) 																																							
Stock	Understand the principles of stock control from sourcing to sale/supply. Understand the management of stock levels, security, restrictions (e.g. age restricted products), wastage and effective systems for recording them	Ensure team complies with stock procedures to minimise stock damage or loss, maximise income and comply with legal requirements; and take appropriate action to sell stock that is near the end of its product, promotional or shelf life											✓	✓	✓	✓	✓										✓	✓	✓	✓										
	<ul style="list-style-type: none"> Team dynamics Performance reviews, SMART planning and target setting to meet team and individual objectives Motivation and monitoring of team members to achieve objectives 																																							
Developing self and others	Understand the knowledge, skills and behaviours required of self and others to develop a high performing team in the business. Understand team dynamics and the importance of enabling team members to appreciate their role in the wider organisation and in meeting business objectives	Plan, organise, prioritise and oversee own and team members' activities, supporting their induction, training, development and coaching, and delegating tasks fairly and appropriately to meet business objectives																																						
	<ul style="list-style-type: none"> Benefits of team building Identification and resolution of conflict within a team 																																							
Team performance	Know how to identify and develop excellent team performance. Understand how the performance of the team contributes to the overall success of the business	Lead the team on a daily basis, setting targets and reviewing progress against them. Motivate team members, provide coaching and on job training. Identify conflict within the team and work to resolve this with support from others						✓																																
	<ul style="list-style-type: none"> Legal requirements relating to a range of retail operations Health and safety supervision and risk analysis 																																							

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Standard: Team Leader (level 3)

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Criteria/Topic	Knowledge and Understanding (Know it)	Skills (Show it)	e-Learning Course Notes	Welcome to Retail	Retail Induction Series	Sales and Service Essentials Compact	Sales and Service Essentials Compact - Level 1	Clear Communication	Equality for Managers	Serving Customers with Hearing Loss	Security Essentials	Managing Stock	Fresh Produce	Visual Merchandising Skills	Effective Merchandising	Food Hygiene Essentials	Managing Food Hygiene	Health and Safety Essentials	Health and Safety Plus	Managing Health and Safety	Fire Safety Essentials	Consumer Law and Food Safety	PCI Essentials	Data Security and Protection Essentials	General Security Awareness Training	Asbestos Awareness	Challenge 25 Alcohol Sales	Alcohol Plus	Challenge 25 Tobacco Sales	Age Restricted Sales	Four Safety Essentials	Forecourt Competent Person	Adult Gaming Centres	Managing People - Preparation	Managing People - Wellbeing	Managing People - Induction	Managing People - Coaching & Performance Management	
Legal and governance	Understand the importance of business compliance to legal requirements and supporting the team to operate in line with business policy and procedures	Ensure self and team always comply with legal requirements, respond quickly to identified risks and ensure they are dealt with in line with business procedures and reported to the appropriate member(s) of the management team														✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
<small>* The range of cultures, characteristics and individual requirements that can affect team members and customers and how and why these may affect the operations/products in a retail environment</small>																																						
Diversity	Understand how to work with and support people from a wide range of backgrounds and cultures and the business policy on diversity	Ensure team members are aware of and follow business policies relating to diversity. Make reasonable adjustments as required for customers or team members							✓	✓																												

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Standard: Manager

Applicable e-learning courses from Upskill People see: www.upskillpeople.com/products

Criteria/Topic	Knowledge and Understanding (Know it)	Skills (Show it)	e-Learning Course Notes	Welcome to Retail	Retail Induction Series	Sales and Service Essentials	Sales and Service Essentials Compact	Sales and Service Challenge - Level 1	Clear Communication	Equality for Managers	Serving Customers with Hearing Loss	Security Essentials	Managing Stock	Fresh Produce	Visual Merchandising Skills	Effective Merchandising	Food Hygiene Essentials	Managing Food Hygiene	Managing Health and Safety	PCI Essentials	Data Security and Protection Essentials	Challenge 25 Alcohol Sales	Alcohol Plus	Challenge 25 Tobacco Sales	Age Restricted Sales	Fuel Safety Essentials	Forecourt Competent Person	Adult Gaming Centres	Managing People - Preparation	Managing People - Wellbeing	Managing People - Recruitment	Managing People - Induction	Managing People - Coaching & Performance Management	Managing People - Appraisals	Managing People - Managing Talent		
Stock	Understand how to manage an effective stock control system; recognise the financial implications to the business and own responsibility to manage stock to meet sales targets, marketing activities and business objectives	Monitor the stock management system to minimise the cost of damage to stock and the loss of stock to the business. Ensure audit compliance and react quickly to results to maintain business standards and stock requirements																																			
<ul style="list-style-type: none"> Training needs analysis The learning and development cycle The importance of feedback Learning styles Training plan design 																																					
Developing self and others	Identify a variety of ways to inspire and motivate team members, how to positively influence their approach to work and how to pass on knowledge and experience. Understand the importance of, and process for, ensuring team members' and own development	Work with team members to maximise their potential and achieve organisations objectives. Implement effective and accurate training on products, services and legislation governing sales, such as age restricted products, trading standards and weights and measures																																			
<ul style="list-style-type: none"> The principles and legal requirements for recruitment and selection Factors that impact on retention of staff The principles of an effective performance management system 																																					
Team performance	Know how to recruit, retain and develop the right people for the right roles. Know the key theories of performance management and how to apply them to retail teams using own organisation's tools and protocols to support them	Recruit the right people into the right job, monitor team performance and recognise excellence, effectively manage performance that is below standard																																			
<ul style="list-style-type: none"> Legal requirements relating to managing a range of retail operations Health and safety Trading standards Data protection Corporate and social responsibility 																																					
Legal and governance	Understand environmental, legislative, corporate, data protection and social responsibilities relating to retail businesses	Manage and continuously review adherence to legislation and regulations/policies for due diligence; handle audits and regulatory authorities such as the Environmental Health Officer appropriately																																			