



Pearson
BTEC

Retail and Sales

September 2021 to August 2022

Guidance for:
BTEC Level 1, Level 2 and
Level 3 qualifications



Last updated 1 September 2021

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Introduction

As COVID-19 may continue to impact upon teaching, learning and assessment through the academic year, affecting those learners who are part-way through their qualifications and those who are commencing this academic year, we have produced this guidance to support the effective delivery of BTEC course content. We are committed to ensuring that learners continue to benefit from the breadth of content of BTEC qualifications through adaptations in teaching and learning.

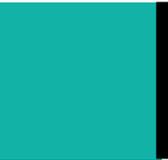
This document is intended to provide you with guidance for how you **might adapt delivery** for the sector's BTEC qualifications in the academic year of 2021-2022.

We will continue to work with our regulators and relevant sector bodies on any possible adaptations or accommodations in line with the relevant policy and regulatory considerations.

Key aspects such as social distancing, safety, lost teaching time, subject content and practical activities have been considered from a sector perspective for your reference. However, it should be noted that all of the guidance provided here must be considered within the context of any relevant guidance issued by your own centre, relevant governing and industry bodies, local and national government.

For further advice and guidance, please refer to the Teaching, Learning and Assessment pages on [Pearson's website](#) or contact us [via the Customer Support portal](#).

We look forward to continuing to support you and your learners throughout this challenging time and wish you well for the coming year.



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Overview

Adaptations to Assessments in 2021/2022

Please refer to the assessment section on the [2021/2022 Teaching and Assessment page](#), for adaptations to assessments and qualifications for the 2021-2022 Academic Year. Here you will find:

- Tech Award Assessment Evidence Adaptations
- Work Experience and Employer Engagement
- Links to Exam timetables
- FAQs

Please note that not all qualifications can or will be adapted, and it is important that you refer to the relevant adaptation guidance for 2021-2022.

Some qualifications will not be adapted for one of the following reasons:

- An adaptation would impact the reliability and validity of the qualification
- The qualification is a licence to practice or primary purpose is progression to the workplace.

Learner eligibility

There are currently no plans to have these adaptations extend to learners who take assessments in 2022/23, regardless of when they are due to certificate.

Adaptations are only available in this academic year, for assessment due to take place between 1 September 2021-31 August 2022.

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Social Distance/Safety

Within the business suite of qualifications many units are able to be delivered remotely. It is felt the delivery and assessment of these programmes (particularly mandatory units) does not usually require a huge amount of group work or close proximity between learners, although learners will frequently work in small groups/pairs for practical based tasks such as roles plays, interviews and event management. Detailed thoughts and delivery approaches are highlighted by individual units in this document. It is suggested that some optional units that may require application of practical skills can be assessed later in the programme delivery should social distancing measures be eased.

Lost time teaching

Many learners will have lost teaching time due to the pandemic, particularly in programmes where units are delivered long and thin and lead directly into the second year of the programme or are needed for synoptic assessment later in the programme. Centres should focus on ensuring that the learners have an adequate foundation for the units that will be delivered in 2021-22. Some units

may have been part completed but not claimed, which needs to be incorporated into delivery schedules for individual programmes.

Flexibility of delivery and assessment

There is considerable flexibility for the use of diverse delivery models and assessment methods within the sector. This document aims to provide some guidance suggestions for adaptations to delivery to support learners in achieving the required standard. Alternative approaches to delivery and assessment can employ written reports, presentations, posters, video or audio recordings and other suitable methods, many learners are also very familiar with technology and all of these can be used in remote delivery. In the 'real life' operations across the Business, Retail, Management and Enterprise sectors, many adaptations of work practices have taken place in these times – it is very much hoped that delivery of qualifications in these sectors can also reflect this.

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What is important to retain the validity of the sector's qualifications?

For Business, Management, Retail and Enterprise qualifications, the difficulty focuses on delivering and assessing interpersonal skills, customer service skills, interview skills and planning and running events provide key skills development that are a requirement in many roles within the industry. It is therefore important that where possible delivery and assessment fully incorporates the practical skills/activities for these types of units.

Face to face delivery time should target skills development required for employment progression in the sector rather than theoretical delivery. Centres may also decide to deliver optional units which do not require practical work in assessment. If it is likely that social distancing measures are to be eased later in the academic year, it might be that practical based units are not assessed until later.

Are there other methodologies that can be used to support the purpose of the qualification?

There are many delivery and assessment methodologies that utilise technologies and new work practices identified throughout this document. Many of these guidance suggestions in delivery enhance learning and skills development and reflect changes in the broad business sector. The use of communications software and online networking is one way to support assessment, particularly where group planning/delivery and working together is a requirement. The requirements for practical assessment and skills demonstration however are vital when working within the sector and therefore the use of platforms such as Zoom/Teams is encouraged. Learners will benefit from using such technology to communicate and this provides them with a realistic experience of how business sector organisations are communicating with each other and their customers increasingly.

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Teaching and learning guidance

Qual/ Unit No.	Unit Title	Remote delivery possible (Y/N)	Socially distanced possible (Y/N)	Potential impact	Potential mitigation
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BTEC Level 1 Retail Knowledge- Unit 2T/502/5819	Understanding Customer Service in the Retail Sector	Y	N	Learning Outcome (LO)3 AC 3.1 and 3.1 Understand how service is adapted to meet the needs of individual customers. The recent COVID-19 outbreak has instigated changes in procedures for customers entering retail premises has introduced the need for clear advice from the retailer on social distancing.	Retail health and safety processes are implemented to control COVID-19. This sector practice is not reflected in the unit content of this unit. Unit amplification for " Meeting customer needs" must now include 'implement necessary health and safety procedures.
BTEC Level 1 Retail Knowledge- Unit 3M/502/5804	Understanding How a Retail Business Maintains Health, Safety and Security on its Premises	Y	N	L0 2 Know how health and safety are maintained on the premises of a retail business AC 2.6 : state why high standards of cleanliness and hygiene should apply to the staff and premises of a retail business : The recent COVID outbreak has instigated changes in procedures for employees and customers on retail premises has introduced the need for learners to identify the reasons for cleanliness and hygiene	Retail health and safety processes are implemented to control COVID-19. This sector practice is not reflected in the unit content of this unit. Unit amplification for "Cleanliness and hygiene: " needs to include" to ensure health and safety of 'employees' and customers. The unit 3 specification 'Delivery' includes learner group visits to retailers and precincts; these can be substituted by individual learner visits and the many TV programmes featuring retail organisations.

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<p>BTEC Level 1 Retail Knowledge- Unit 4 T/502/5805</p>	<p>Understanding the Retail Selling Process</p>	<p>Y</p>	<p>Y</p>	<p>AC 3.4 Identify basic rules for demonstrating products to customers is not highlighted in the unit amplification. There are health and safety implications for practical demonstration of some items especially cosmetics and food, as well as white and brown goods.</p>	<p>Unit amplification for LO3 needs to be separated by ensuring 'Rules for demonstrating products' commences a new paragraph, the 'e.g.' is deleted and insert "complying with health and safety procedures." The unit 4 specification 'Delivery' includes group visits to retailers which can be substituted by individual learner visits and the many TV programmes featuring retail organisations and possible WEX which will require compliance with health and safety.</p>
<p>BTEC Level 1 Retail Knowledge- Unit 5 J/502/5808</p>	<p>Control, Handling and Replenishment of Stock in a Retail Business</p>	<p>Y</p>	<p>N</p>	<p>Since the outbreak of COVID-19 in the UK, retailers have been replenishing stock more frequently during trading hours which has meant the vicinity /area around staff implementing this process has decreased to less than the required distance.</p>	<p>Unit amplification for AC 3.1; 'outline the procedures for replenishing stock on display', needs to include an insertion following 'procedures' 'adhering to health and safety requirements '.</p>

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<p>BTEC Level 1 Retail Knowledge- Unit 8 F/501/5939</p>	<p>Running an Enterprise Activity</p>	<p>Partial</p>	<p>Y</p>	<p>The health and safety issues relating to LO2 will produce barriers to the implementation of the selling role play assessment. Although as social distancing has now been reduced to 1m, this is now very feasible.</p>	<p>AC 2.1 Demonstrate selling a product or service, taking into account the practical and personal skills needed can be performed and assessed but the amplification needs to include ' complying with health and safety procedures. The unit 8 specification 'Assessment' P 64, also requires amendment as the paragraph headed 'To achieve 2.1.....' also needs to include; the learner must adhere to health and safety requirements</p>
<p>BTEC Level 1 Retail Knowledge Unit 9 F/501/5827</p>	<p>Being Responsible for Other People's Money</p>	<p>N</p>	<p>Y</p>	<p>LO1 Know different methods of payment and when they could be used /LO 4 - Be able to handle financial transactions responsibly. is a performance assessment criterion and during the recent outbreak this has been a key area where cross infection can occur. Outlets/stores have encouraged contactless payment by either card or mobile phone - neither of which are included in the unit amplification.</p>	<p>Unit amplification for AC 1.1- Identify different methods of payment - needs to include in methods of payment - contactless payment methods e.g. card or mobile phone; Scan and Go systems & gift cards. CHEQUE must be deleted as these are no longer valid tender. AC 1.2 Describe when different methods of payment are likely to be used needs to include 'compliance with health and safety procedures' and 'internet sales'. AC 4.1 is a performance criterion and therefore if either WEX or role play are used as an assessment method, compliance to health & safety in terms of distancing and screening must be actioned. the unit amplification for 'Financial transactions' must include 'implementing health and safety procedures to reduce cross infection e.g. regularly hand cleansing, keeping the required distance and using any physical barriers. RECEIVE CHEQUES' needs to be deleted</p>

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					and replaced with -'Correct processing of debit, credit and gift cards, vouchers, contactless payments such as Smart phone payments. The unit 9 specification 'Assessment' P 69 requires amendment for 4.1. This must include the learner must adhere to health and safety requirements when being assessed.
BTEC Level 1 Retail Knowledge Unit 11 H/502/5797	Understanding the Handling of Customer Payments in a Retail Business	Y	Y	The issues relating to this unit (which is level 2) are identical to Unit 9.	Unit amplification for AC 1.1- Identify different methods of payment - needs to include in methods of payment - contactless payment methods e.g. card or mobile phone; Scan & Go systems & gift cards. CHEQUE must be deleted as these are no longer valid tender. Process methods needs to include compliance with health and safety procedures. AC 3.1 'outline the cashier's key responsibilities for serving customers at the payment point' - the unit amplification for 'Cashier's responsibilities must include 'implementing health and safety procedures to reduce cross infection e.g. regularly hand cleansing, keeping the required distance and using any physical barriers. CHEQUES' needs to be deleted and replaced with 'debit' as to be inserted -'Correctly processing contactless payments, Smart phone payments, Gift cards, vouchers. The Unit 11 specification 'Assessment' P95 requires amendment for 3.1. This must include'the learner must adhere to health and safety procedures when performing and being assessed.'

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BTEC L2 Technical Certificate in Retail Operations	This qualification consists of 4 mandatory units. Unit 1 which is externally assessed has been checked and currently no amendments are required.			The practical elements of this qualification and employer involvement are the key issues in terms of safe assessment.	Many learners will be in employment and therefore many health and safety processes will be implemented to control COVID-19. This sector practice is not reflected in the unit content of this unit. The revised social distancing on 1m can allow for assessment of performance. WEX will be at the discretion of the retailer.
Pearson BTEC Level 2 Technical Certificate in Retail Operations Unit 2	Delivering Customer Service in Retail	N	Y	The main issue relating to this unit is the additional inclusion of Health and Safety legislation in the unit content for A3 and assessing practical performance; Learning Aim B Demonstrate appropriate customer service in different retail situations	A3 Complying with legal principles and requirements - unit content A.P3 'Describe how legal principles impact on the customer service operations of the selected business' - a separate line to include Health and Safety. The assessment of Learning Aim B Demonstrate appropriate customer service in different retail situations B.P4,B.M2, BD2 Demonstrate appropriate/effective/consistent and effective communication skills to meet customer needs when responding to three different customer types in three customer service situations as either observed/witnessed WEX or role play needs to be safe. Unit content B6- Methods of payment needs to include 'implementing appropriate health and safety procedures'. Essential information for assessment decisions needs to ensure observers/witnesses and learners are safe

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<p>Pearson BTEC Level 2 Technical Certificate in Retail Operations Unit 3</p>	<p>The Retail Buying and Selling Process</p>	<p>N</p>	<p>Y</p>	<p>The main issue relating to this unit is the additional inclusion of Health and Safety legislation in the unit content for C3 'Demonstrate the selling process in different retail situations' and assessing practical performance</p>	<p>Unit content for C3 Preparing to sell & C4 The buying signals and closing sales - needs to include 'implementing health and safety processes/procedures. The assessment requirement for C.P5/M3/D2 Demonstrate /confidently/ consistently, confidently and effectively the selling process for two different products or services in retail situations is a practical performance and therefore a detailed witness or observation records of a demonstration of sales skills for two different products or service are required requires observed/witnessed WEX or role play which needs to be safe. Essential information for assessment decisions needs to ensure observers/witnesses and learners are safe</p>
<p>Pearson BTEC Level 2 Technical Certificate in Retail Operations Unit 4</p>	<p>Creating a Retail Outlet</p>	<p>N</p>	<p>Y</p>	<p>This entire synoptic unit focusses on practical teamwork, however, should social distancing still be in place this is totally aligned with current retail practice. As, this is a realistic situation in retail outlets and on-line warehouses, facilitators must ensure appropriate safe performance and assessment are implemented</p>	<p>Following the new social distancing of 1m, there is no need to amend this unit content as A1 includes Health and Safety. C1 also includes 'Acting responsibly' which will now ensure appropriate health and safety processes are implemented. Therefore, the performance of CP5, CM3, CD3 should reflect current retail sector team safety processes as well as safe assessment.</p>

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Pearson BTEC Level 2 Certificate in Principles of Sales				This qualification can be both discrete and act as the Tech Cert of a Sales Apprenticeship and therefore is knowledge based. Therefore, most learners will be employed with few WEX with sales organisations. Units 1,2,3,4 are mandatory	Many learners will be in employment and therefore many health and safety processes will be implemented to control COVID19. This sector practice is not reflected in the unit content of this unit.
Pearson BTEC Level 2 Certificate in Principles of Sales UNIT 2: A/502/8205	Understanding Sales Techniques	Y	N	This mandatory unit covers all sales situations including Learning Outcome 8 (face-to-face selling) "Understand how to process sales orders" includes payment methods.	The unit content for AC 8.2 "Describe an organisation's payment methods" needs to be amended to 'EFTPOS with Chip and Pin and Contactless' Both of which are recommended by all traders as safer payment options. Delivery (P 21) and role play (Paragraphs 2, 3 & 5) requires slight adjustment regarding suggested group work and role play - insert "safe" before both.
Pearson BTEC Level 2 Certificate in Principles of Sales-Unit 8: A/502/821	Principles of Selling at Trade Fairs and Exhibitions	Y	N	This unit focusses on selling situations at trade fairs and exhibitions, access to both are now under review by HMG. However, Learning Outcome 3 'Understand techniques for selling at trade fairs and exhibition' includes the importance of display and presentation of good	The unit content for AC 3.1 "Displays are arranged and presented to attract potential customers", needs to be amended to include 'safety of customers and sales staff, e.g. implementing health and safety procedures. Delivery (P 77) states "It is recommended that visits to trade shows and exhibitions are planned as part of the delivery". This may not be feasible, nevertheless perhaps replace 'ESSENTIAL' with 'recommended'. The safety issues relating to Group work/role play as in Unit 2 (Paragraph 4) also apply. Essential resources for this unit may have to be amended if within

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					the next 12 weeks access to venues is not permitted, as it is currently (Paragraph 1, last sentence) 'Attendance and/or participation in trade shows and/or exhibitions is essential for this unit.
Pearson BTEC Level 3 Certificate in Principles of Sales				Although the mandatory units 1-4 have the same titles as those at Level 2, the unit content focus for Level 3 is aimed at a supervisory role and its responsibilities.	Many learners will be in employment and therefore health and safety processes will be implemented to control Covid 19. This sector practice is not reflected in the unit content. Throughout the specification there are references especially in the Delivery and Essential Resources sections for each unit, to learner visits, group work and role play. All these can be substituted by accessing some TV programmes, You Tube and virtual group work and role play can be facilitated using Zoom etc.
Pearson BTEC Level 3 Certificate in Principles of Sales Unit 2 J/502/8210	Understanding Sales Techniques and Processes	Y	N	This is a similar unit to Level 2 covering all sales situations including face-to-face. However, the unit content has a different focus as Learning Outcome 3 focusses on the implementation of sales plans.	The unit content for AC 3.1 "Explain the importance of preparing for sales activities - Preparing for face to face sales activities to be amended to include 'implementation of health and safety procedures'. Delivery (P 27) recommends a visit to a call centre (Paragraph 3) and role play (Paragraph 4), however these experiences can be substituted by access to You Tube/TV programme, or shared by those working in a (even in a remote) sales environment via Zoom etc.

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Pearson BTEC Level 3 Certificate in Principles of Sales Unit 8 A/502/8219	Principles of Selling at Trade Fairs and Exhibitions	Y	N	This unit is the same as Unit 8 for the Level 2 qualification and therefore the same issues apply	Please refer to Level 2 Unit 8
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