

apprenticeship FRAMEWORK

Higher Apprenticeship in Sales (Wales)

IMPORTANT NOTIFICATION FOR ALL APPRENTICESHIP STARTS FROM 14 OCTOBER 2016

Modifications to SASW came into effect on 14 October 2016. These changes relate to the Essential Skills and Employer Rights and Responsibilities requirements of a framework and they **ONLY** apply to new Apprenticeship starts on, or after, 14th October. Apprenticeship starts before this date must continue to meet the 2013 SASW requirements for Essential Skills and Employer Rights and Responsibilities.

For more details of the changes and how they will affect new apprenticeship starts, please read the following preface page to the framework document. NB: Please check the "Revising a Framework" section for information on any additional changes that may have been made to this framework.

Latest framework version?

For any previous versions of this framework: www.acwcerts.co.uk/framework_library

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Contents

Framework summary.....	3
Framework information.....	4
Contact information.....	5
Purpose of the framework.....	6
Entry conditions.....	8
Level 5: Sales.....	10
Pathway 1: Sales.....	11
Equality and diversity.....	25
On and off the job training.....	28
Essential employability skills.....	32

Framework information

Information on the Issuing Authority for this framework:

Instructus

The Apprenticeship sector for occupations in air conditioning, building services engineering, business and administration, cleaning, customer service, digital/information technology, electro technical, electrical and electronic servicing, enterprise and business support, facilities management, heating and ventilating, housing, human resources and recruitment, industrial relations, leadership and management, marketing and sales (also includes contact centres and third sector), plumbing, property and refrigeration.

Issue number: 1	This framework includes:
Framework ID: FR03195	Level 2 <input type="checkbox"/> Level 3 <input type="checkbox"/> Level 4-7 <input checked="" type="checkbox"/>
Date this framework is to be reviewed by: DD/MM/YYYY	This framework is for use in: Wales

Short description

This framework is designed to meet the skills needs of employers of all sizes across the public, private and not-for-profit sectors in Wales. It will attract new talent into Sales and will help to up skill the workforce to meet employer skills priorities. Higher apprentices will work in job roles such as Sale Manager, Sales Account Manager, Sales Operations Manager, Sales Team Manager.

Contact information

Proposer of this framework

This framework is published by Skills CFA, in association with the Institute of Sales and Marketing Management. Employers, training providers and colleges fed into the development of the apprenticeship and qualification. The framework is supported by organisations such as BT, Dunbia, Coleg Sir Gar, Santander UK, Cymdeithas Gofal The Care Society.

Developer of this framework

Name: Sian Warr

Organisation: Instructus

Organisation Type: Standard Setting Body

Job Title: Project Co-ordinator

Phone: 01536 738631

Email: Skills@instructus.org

Postal address: Unit 3 Cherry Hall Road
North Kettering Business Park
Kettering
NN14 1UE

Website: www.instructus-skills.org

Issuing Authority's contact details

Issued by: Instructus

Issuer contact name: Dan Forbes

Issuer contact phone: 01536 738631

Issuer Email: skills@instructus.org

Contact Details

Who is making this revision |Name|

Your organisation |Instructus|

Your email address: |skills@instructus.org|

Revising a framework

Why this framework is being revised

|Framework Developer to complete with relevant info|

Summary of changes made to this framework

|Framework Developer to complete with relevant info|

Qualifications removed

|Framework Developer to complete with relevant info|

Qualifications added

|Framework Developer to complete with relevant info|

Qualifications that have been extended

|Framework Developer to complete with relevant info|

Purpose of this framework

Summary of the purpose of the framework

Skills in sales and the organisation of sales activities have a major impact on the competitive edge of all different types of organisation across all sectors, as well to the economy as a whole. For sales occupations at this level there is an emphasis on 'soft skills' such as networking and relationships so as to build long-term relationships rather than one-off transactions. In addition, there is an importance attached to developing skills in relation to organising and managing sales activities as well as such things as budgeting and planning.

Sales and telesales occupations account for the employment of 89,000 individuals in Wales. The Higher Apprenticeship in Sales is aimed at those employed in managerial sales occupations. Although there are no statistics to show the extent of employment in these types of occupations specifically, in Wales 365,000 people are employed within Managers and Senior officials, and Professional occupational fields. These statistics indicate that it is likely there is a substantial amount of individuals employed in sales managerial occupations.

'*The Employer Skills Survey 2013: Wales Report*' revealed that Managers and Professional occupations were the occupation groups most affected by the need to up-skill. Furthermore, it was outlined that 47 per cent of those employed as Managers were the group least likely to have received training in the previous 12 months. In addition to this, the report shows that the main cause of the skills gap within Sales and Customer Service occupations was that training was only partially completed. Therefore, there is a great need to improve and reduce the skills gap within managerial sales occupations as it impacts heavily on competition, and organisational productivity and profitability.

Sales employers have indicated that within the profession there is a need to:

- promote the use of qualifications to update skills and build the professional status of Sales as a career, as a means of raising the professionalism of Sales
- widen the availability of accredited training to meet the challenges of international competition and increase employee retention
- address the skills needed by future sales professionals, including strategic account management, commercial/business awareness and business development skills, as well as the soft skills of time management, IT and communication, including negotiating and influencing skills
- develop staff with the skills required rather than relying on recruiting qualified and experienced sales professionals from outside the UK

This framework is designed to meet the needs outlined above for employers of all sizes across the public, private and not-for-profit sectors. It will attract new talent into sales and will help

to up skill the workforce to meet employer skills priorities. There is a strong need for highly skilled Sales Managers in Wales in order to give a competitive edge in an increasingly competitive and diverse international market.

Aims and objectives of this framework (Wales)

The aim of the apprenticeship is to provide employers of all sizes and across all sectors in Wales with a high quality, nationally recognised programme which will retain talent in Sales and up skill the existing workforce to make businesses more productive, efficient and profitable.

The main objectives are to:

1. Build a competent workforce in Wales, providing organisations of all sizes across all sectors with the staff needed to increase productivity and efficiency
2. Tap into the skills and talents of a diverse population by providing flexible entry routes into a career in Sales
3. Develop the skills of new and existing members of staff to enable them to initiate, manage and support innovative activity which contributes to the productivity, profitability and competitiveness of the business
4. Provide apprentices with an opportunity to develop the skills, knowledge and experience they will need to progress to higher level roles with additional responsibilities and onto further and higher education, if they wish to do so.

Entry conditions for this framework

There are no mandatory entry requirements for this apprenticeship framework. However employers are looking to attract apprentices who have a strong interest and/or practical experience of sales. They expect applicants to demonstrate a "can do" attitude and have basic numeracy, literacy and communication skills on which the apprenticeship will build.

Entrants will come from a diverse range of backgrounds and will come with a range of experiences, age, personal achievements and, in some cases, prior qualifications and awards which may count towards the achievement of an apprenticeship programme. The examples below, which are in no particular order of preference, include having:

- held a position of responsibility at school or college; OR
- undertaken work experience or work placement experience; OR
- completed the Duke of Edinburgh Award or similar award; OR
- achieved a Welsh Baccalaureate Principle Learning Qualification; OR
- achieved GCSEs or A levels; OR
- achieved QCF Awards, Certificates or Diplomas at level 3 or 4
- completed the level 3 Apprenticeship in Sales and Telesales
- completed one of a range of apprenticeships at level 3 or 4

Apprentices who are undertaking the Sales Level 5 Higher Apprenticeship are likely to have some prior experience in a managerial or team leader role, although this is not a formal requirement.

Apprentices who are undertaking the Higher Apprenticeship in Sales are expected to have significant experience of working in sales to ensure they have the suitable foundations on which to further build their knowledge and skills.

RULES TO AVOID REPEATING QUALIFICATIONS

Processes exist to make sure that applicants with prior knowledge, qualifications and experience are not disadvantaged by having to repeat learning. Training providers and awarding organisations will be able to advise on the current rules for accrediting prior learning and recognising prior experience.

1. Essential Skills Wales (ESW)

- Key skills qualifications are accepted as alternatives to ESW qualifications provided the

key skills qualification(s) attained are at the same level(s) as those specified for ESW

qualifications.

- ESW qualifications achieved at the level specified in the framework, prior to commencing an apprenticeship can be accepted, provided that the required certificate is presented at the point of certification.
- ESW achieved in the context of the Welsh Baccalaureate Qualification (WBQ) can be accepted, provided the specific certification of the title(s) and level(s) of those ESW qualification is provided. The WBQ certificate itself does not provide this specific evidence.
- Where an individual has achieved ESW at level 1 in either Application of Numbers, Communication or ICT or has the relevant key skill prior to starting a level 2 apprenticeship, the employer may allow the individual to study for ESW skills qualifications at level 2 as part of the apprenticeship.

2. Knowledge qualifications.

- If applicants already have one of the knowledge qualifications before they started their Apprenticeship, (see knowledge qualifications page in this framework) they can count this and do not have to redo the qualification, providing that they have achieved this qualification within 5 years of applying for the Apprenticeship certificate. For example, they may have already achieved the knowledge element as part of the Welsh Baccalaureate. The hours they spent gaining this qualification will also count towards the minimum hours required for this framework.

3. Competence qualifications

- If applicants already have one of the competence qualification for the Apprenticeship they do not have to repeat this qualification, however, this qualification must have been achieved within 5 years of the start of the Apprenticeship and they will still have to demonstrate competence in the workplace.

4. Prior experience

- Applicants already working in the sector will be able to have their prior experience recognised by the Awarding Organisation and this will count towards the competence and the knowledge qualifications in this framework.

Initial Assessment

Training providers and employers will use initial assessment to ensure that applicants have a fair opportunity to demonstrate their ability and to tailor programmes to meet individual needs, recognising prior qualifications and experience.

Level 5

Title for this framework at level 5

Sales

Pathways for the framework at level 5:

Pathway 1: Sales

Level 5, Pathway 1: Sales

Description of this pathway

Higher Apprenticeship in Sales - Minimum credits 86

This includes a minimum of :

- Combined qualification - 68
- Essential Skills Communication, Application of Numbers, and ICT - 18

Entry requirements for this pathway in addition to the framework entry requirements

There are no entry requirements for this pathway in addition to the general framework entry requirements.

However, it is expected that higher apprentices will have significant experience of working in sales or at a middle management level to ensure they have the suitable foundations on which to further build their knowledge and skills. Learners who do not have any sales experience may be better suited to the Sales & Telesales Foundation Apprenticeship. Learners who have limited prior experience in a sales role may be better suited to the Level 3 Sales & Telesales Advanced Apprenticeship.

Job title(s)	Job role(s)
Sales Manager; Sales Operations Manager; Sales Team Manager	Managing the efficiency of sales support team, developing relationships with key decision makers, generating leads, creating opportunities to upsell, product knowledge & in-depth market information, meeting business targets, maintaining a sales pipeline, reviewing tender documents & submitting bids.
Sales Account Manager	Managing a portfolio of accounts, maintaining and growing client relationships, lead generation through a network of industry contacts, deliver sales presentations to clients and high-level executives.

Qualifications

Competence qualifications available to this pathway

N/A

Knowledge qualifications available to this pathway

N/A

Combined qualifications available to this pathway

B1 – Level 5 Diploma in Sales (QCF)

No.	Ref no.	Awarding organisation	Credit value	Guided learning hours	UCAS points value
B1a	601/5433/0	Institute of Sales and Marketing Management	68	335-485	N/A

Relationship between competence and knowledge qualifications

The Level 5 Diploma in Sales includes both knowledge and competence units. Learners must complete a minimum of 68 credits: 18 credits from Mandatory units, a minimum of 36 credits from Group B Optional units and a maximum of 14 credits group C Optional units.

The SASW requires the completion of at least 10 credits of knowledge and 10 credits of competence through the duration of an apprenticeship framework. Through completion of the mandatory units apprentices will cover 12 credits of knowledge and 6 credits of competence. The remaining minimum requirement of 4 credits of competence will be covered through the completion of competence units from Groups B and C. As there is only one knowledge unit contained in either of Groups B and C (8 credits), the minimum possible amount of competence credits that an apprentice can achieve, in addition to those achieved through the Mandatory Group, is 42. Therefore the minimum requirement for competence credits is completed through the achievement of credits through the Optional Groups.

Mandatory Group

Competence units

Y/503/0608 - Sales forecasts and target setting (6 credits)

Knowledge units

D/502/9735 - Managing responsible selling (4 credits)

D/506/9118 - Understanding customer accounts (8 credits)

Group B Optional Group

Competence Units

R/503/0610 - Motivation and compensation for sales teams (6 credits)
Y/503/0611 - Coaching and mentoring (6 credits)
D/503/0612 - Designing, planning and managing sales territories (6 credits)
H/503/0613 - Analysing the financial potential and performance of customer accounts (6 credits)
A/503/0617 - Bid and tender management for account managers (6 credits)
T/503/0616 - Developing a product portfolio (6 credits)
M/502/9738 - Operational sales planning (5 credits)
K/502/9740 - Analysing the marketing environment (5 credits)
T/502/9739 - Sales negotiations (5 credits)
M/502/9741 - Finance for sales managers (7 credits)
T/502/9742 - Writing and delivering a sales proposal (4 credits)
R/506/9116 - Customer Relationship Management (6 credits)
J/503/0880 - Developing strategic relationships with major customers (7 credits)
L/503/0878 - Salesforce organisation (7 credits)
J/503/0877 - Planning and implementing sales and marketing strategy (7 credits)
R/503/0879 - Sales forecasting and budgeting (7 credits)
M/503/0615 - Relationship management for account managers (6 credits)
D/503/0609 - Leading a team (6 credits)

Knowledge units

L/503/0606 - Understand the integrated functions of sales and marketing (8 credits)

Group C Optional Competence Group

H/506/1957 - Prepare specifications for contracts (4 credits)
M/506/1959 - Manage events (6 credits)
J/506/1949 - Develop and maintain professional networks (3 credits)
M/506/1962 - Encourage learning and development (3 credits)
A/506/1995 - Manage a budget (4 credits)
R/506/2909 - Recruitment, selection and induction practice (6 credits)
F/506/1982 - Develop working relationships with stakeholders (4 credits)

As part of the evidence requirements for Apprenticeship Completion Certification, a copy of a completed, current Apprentice Certificate Claim form must be uploaded to ACW (<http://acwcerts.co.uk>).

Essential Skills

An apprenticeship framework must specify as a Welsh certificate requirement the expected achievement levels of Essential Skills in Communication and the Application of Number, and Digital Literacy (where required).

ESSENTIAL SKILLS WALES

Communication	Min.Level 2
Application of Number	Min.Level 2
IT/Digital Literacy	Min.Level 2

For the current list of acceptable proxy qualifications and appropriate minimum grade/level requirements, please refer to the most recent version of SASW on the gov.wales website. Additional guidance materials can be found on the Knowledge Base section of the ACW website.

Progression routes into and from this pathway

Progression into the Sales Higher Apprenticeship

Progression into the Sales Higher Apprenticeship may be from a wide number of routes due to the varying backgrounds and past academic and work related experiences of apprentices. Such routes will including having:

- significant experience in a business role
- achieved an advanced apprenticeship in a wide range of sector specific areas such as Sales & Telesales, Management, Business Administration or Customer Service
- achieved QCF awards, certificates or diplomas in Sales or sector specific areas
- achieved a Welsh Baccalaureate Principal Learning Qualification at Foundation or Higher level
- achieved GCSEs or A Levels.

Learners may also progress into this higher apprenticeship without prior qualifications.

It is expected that higher apprentices will have significant experience of working in a sales role to ensure they have the suitable foundations on which to further build their knowledge and skills. Learners who do not have any experience of working in a sales role may be better suited to the Sales & Telesales Foundation Apprenticeship. Learners who have only limited prior experience in a sales role may be better suited to the Sales & Telesales Advanced Apprenticeship. All individuals should be judged on their own merits, experiences and capabilities to ensure they are enrolled in the most appropriate apprenticeship framework.

Progression from the Level 5 Higher Apprenticeship in Sales

Higher apprentices, with support and opportunities in the workplace, can progress onto:

- a range of Sales and Leadership and Management qualifications at level 6 and above
- higher education to undertake sales, business or management qualifications, including Degrees or Masters in Sales Management and Marketing and Sales Management.
- further employment opportunities within their current job role/alternative job roles
- specialised qualifications providing additional technical knowledge
- possible membership of professional bodies, including the Institute of Sales & Marketing Management. With additional training, higher apprentices may be able to progress in their careers to senior management or director level roles and, in time, to chief executive positions.

UCAS points for this pathway:

N/A

Employee rights and responsibilities

Please note that for Apprenticeship starts from 14/10/2016 onwards ERR is no longer a **mandatory** requirement in all frameworks.

However, it may still be included in some frameworks and where it is not explicitly stated that ERR is not a requirement then confirmation of an Apprentice's ERR achievement will still remain a requirement for Apprenticeship certification purposes.

Is ERR a requirement for this framework? **YES** ☒ **NO** ☐

Delivery and assessment

[Framework Developer to complete with relevant info]

[

]

The remaining sections apply to all levels and pathways within this framework.

How equality and diversity will be met

According to National Statistics, approximately 65% of individuals working within sales accounts and business development roles are male. Although at lower levels the sales workforce is heavily dominated by younger workers, at higher levels the age profile of the workforce changes considerably.

Although there is currently no data covering the ethnicity of individuals working within these occupations, it seems likely that it would be broadly reflective of other, similar level management occupations. In this way, it is probable that Sales roles at this level are largely representative of the population as a whole in terms of practitioners from minority backgrounds and those with disabilities.

The sales workforce at this level is predominantly consisted of full-time roles; only 5 per cent are engaged in part-time employment. The proportion of those working part-time is overwhelmingly female: 90 per cent of the total part-time workers are female. Of the 35 per cent of female workers engaged in these occupations, 14 per cent are part-time.

The development of this Apprenticeship framework aims to mitigate potential equality and diversity issues by developing an open, clear and fit-for-purpose Apprenticeship framework that provides a non-graduate entry route into the profession and supports recognised progression routes through the profession.

As the UK workforce and customer base becomes more diverse, sales needs to reflect that diversity and manage it effectively. This requires not only sensitivity to issues such as ethnicity, culture, gender and disability, but an awareness of the potential for different and more creative approaches that diversity in general brings.

Apprenticeships are seen as a vital route to encourage and facilitate a diverse set of individuals entering into sales. Entry conditions into this framework do not discriminate against any individuals, with the framework being open and accessible to all potential apprentices. Mentoring is also promoted within the apprenticeship to provide additional support and increase the chances of apprentices completing the framework. Training providers support and increase the chances of apprentices completing the framework. Training providers and employers must also comply with the Equality Act 2010

(<http://www.equalityhumanrights.com/advice-and-guidance/new-equality-act-guidance/>) to ensure that applicants are not discriminated against in terms of entry to and promotion within, the Industry, using the protected characteristics of:

- age
- disability

- gender reassignment
- marriage and civil partnership
- pregnancy and maternity
- race
- religion or Belief
- gender
- sexual orientation

Skills CFA will monitor take-up and achievement of all apprenticeships and take steps to address any barriers to take-up and achievement.

On and off the job training

Summary of on- and off-the-job training

Training time for the Level 5 Sales Higher Apprenticeship (Wales) programme is split into on-the-job training hours and off-the-job training and hours, as described below.

Total on-the-job and off-the-job training hours are as follows:

- Level 5 Sales – 498 hours

Off-the-job training

Level 5 Sales Higher Apprenticeship

The total off-the-job training for the Sales Higher Apprenticeship is **181 hours**, made up as follows:

- 60 hours for Essential Skills Wales (20 hours per skill)
- 73 hours (minimum) associated with the competence and knowledge element of the combined qualification
- 48 hours of off-the-job coaching and mentoring to support the apprentice.

How this requirement will be met

Training hours delivered under an Apprenticeship Agreement may vary depending on the previous experience and attainment of the apprentice.

The amount of off-the-job training required to complete the apprenticeship under the Apprenticeship Agreement may then be reduced accordingly, provided the total number of off-the-job hours for this framework can be verified for apprenticeship certification.

Previous attainment

Where a learner enters an apprenticeship agreement having previously attained parts or all of the relevant qualifications, this prior learning needs to be recognised using either QCF credit transfer for achievements within the QCF; or through recording certificated learning outside of the QCF, for example Principal Learning qualifications.

For apprentices who have already achieved the relevant qualifications, they must have been certificated within five years of applying for the apprenticeship certificate.

Previous experience

Where a learner enters an Apprenticeship Agreement with previous work-related experience, this prior learning needs to be recognised [see QCF Guidance on Claiming Credit for further details]. To count towards Apprenticeship certification, previous experience must be recorded using the appropriate Awarding Organisation's CQFW 'Recognition of Prior Learning' (RPL) procedures and the hours recorded may then count towards the off-the-job hours required to complete the apprenticeship.

For apprentices with prior uncertificated learning experience, the off-the-job learning must have

been acquired within five years of application for the apprenticeship certificate or have been continuously employed in the relevant job role in the industry for three years duration.

Off-the-job training needs to:

- be planned, reviewed and evaluated jointly between the apprentice and a tutor, teacher, mentor or manager;
- allow access as and when required by the apprentice either to a tutor, teacher, mentor or manager;
- be delivered during contracted working hours;
- be delivered through one or more of the following methods: individual and group teaching, e-learning, distance learning, coaching; mentoring, feedback and assessment; collaborative/networked learning with peers, guided study and induction.

Off-the-job training must be formally recorded, either in a diary, workbook, portfolio, or be verified by attendance records. This evidence needs to be checked and signed by the assessor and employer.

Evidence of off the job hours

The Apprenticeship Certificate Claim Form requires apprentices to acknowledge that they have received the minimum required levels of on the job and off the job training, as set out in the apprenticeship framework document. No other evidence is required to be uploaded to ACW.

All Welsh apprenticeship certificates must be claimed via the ACW (Apprenticeship Certification Wales) online system. This online system, which went live in July 2013, is operated by Skills CFA on behalf of the Federation For Industry Sector Skills and Standards (FISSS).

In order to claim a Welsh apprenticeship certificate you must register on ACW via this link - http://acwcerts.co.uk/register_centre . |

On-the-job training

The total on-the-job training for the Team Leading Foundation Apprenticeship is **317 hours**, made up as follows:

- 120 hours for Essential Skills Wales (40 hours per skill)
- 137 hours (minimum) for the competence based qualification
- 60 hours of on-the-job coaching and mentoring to support the apprentice

How this requirement will be met

On-the job training is defined as skills, knowledge and competence gained within normal work duties.

These hours may vary depending on previous experience and attainment of the apprentice. Where a learner enters an Apprenticeship Agreement having previously attained or acquired

the appropriate competencies or knowledge, this prior learning needs to be recognised and documented using the relevant QCF credit transfer, QCF exemption or RPL procedures (as off-the-job above). The amount of on-the-job training required to complete the apprenticeship under the Apprenticeship Agreement may then be reduced accordingly, provided the total number of on-the-job hours for this framework can be verified for apprenticeship certification.

Apprentices who commence training under a new Apprenticeship Agreement with a new employer may bring a range of prior experience with them. When an apprentice can claim 25% or more hours towards the on-the-job framework total through prior learning acquired from previous full-time education, employment or other vocational programmes, then the apprentice's learning programme should include 'customisation'.

Training providers are encouraged to identify additional on-the-job training programmes that customise the learning to the new workplace. Customisation programmes may include:

- selecting appropriate additional Unit(s) from QCF qualifications, or relevant units recognised as Quality Assured Lifelong Learning [QALL] through a CQFW recognised body
- following Essential Skills at a level higher than that specified in the framework
- including one or more Wider Key Skills or other competency-based qualifications/units relevant to the workplace.

For apprentices who have already achieved the relevant qualifications, they must have been certificated within 5 years from the date of application for the foundation apprenticeship/apprenticeship certificate or have been continuously employed in the industry for three years. Job roles within Sales at this level require a thorough level of technical competence and knowledge, which will be undertaken through work-based training, practice and experience.

On-the-job learning must be formally recorded, either in a diary, workbook, portfolio, or be verified by attendance records. This evidence needs to be checked and signed by the learner and assessor.

Evidence of on the job training hours

The Apprenticeship Certificate Claim Form requires apprentices to acknowledge that they have received the minimum required levels of on the job and off the job training, as set out in the apprenticeship framework document. No other evidence is required to be uploaded to ACW.

All Welsh apprenticeship certificates must be claimed via the ACW (Apprenticeship Certification Wales) online system. This online system, which went live in July 2013, is operated by Skills CFA on behalf of the Federation For Industry Sector Skills and Standards (FISSS).

In order to claim a Welsh apprenticeship certificate you must register on ACW via this link - http://acwcerts.co.uk/register_centre . |

Wider key skills assessment and recognition

While Wider Key Skills are not a **mandatory** part of the framework, training providers are encouraged to provide apprentices the opportunity to achieve them.

For this framework, there are natural opportunities for Wider Key Skills to be embedded within the mandatory units of the following qualifications:

<div>Enter Qualification Names</div>

Improving own learning and performance

Give examples - signpost to specific units in framework qualifications that would meet these requirements

Working with others

Give examples - signpost to specific units in framework qualifications that would meet these requirements

Problem solving

Give examples - signpost to specific units in framework qualifications that would meet these requirements

apprenticeship FRAMEWORK

For more information visit-
www.acwcerts.co.uk/framework_library