



CUSTOMER SERVICE SPECIALIST APPRENTICESHIP STANDARD LEVEL 3

Attract great talent, upskill your teams
and plan for your future.

Suitable for both new and existing employees.



PROGRAMME OVERVIEW

DURATION

The duration of this apprenticeship is typically 17 months (depending on experience)

STUDY MODE

- Online with tutor led sessions.
- Blended learning with online and face-to-face sessions and support (at the employers premises)
- There is an End-Point-Assessment for this apprenticeship. This is when the learner will demonstrate they have learnt the required knowledge, skills and behaviours.

QUALIFICATIONS TO BE AWARDED

- Level 3 Customer Service Specialist Apprenticeship
- Functional Skills English and maths (if required)

PROGRESSION OPPORTUNITIES

Completion of this apprenticeship will lead to eligibility to join the Institute of Customer Service as an Individual member at Professional level. Should the learner choose to progress on a customer service career path, they may be eligible for further professional membership including management.

ON-PROGRAMME LEARNING		EPA	
KNOWLEDGE & SKILLS <ul style="list-style-type: none">• Business knowledge and understanding• Customer journey knowledge• Knowing your customers and their needs/ customer insight• Customer service culture and environment awareness• Business-focused service delivery• Providing a positive customer experience• Working with your customers/ customer insights• Customer service performance• Service improvement	BEHAVIOURS <ul style="list-style-type: none">• Develop self• Ownership/ responsibility• Team working• Equality• Presentation	EPA GATEWAY	END-POINT-ASSESSMENT
0-14 MONTHS		3 MONTHS	

KNOWLEDGE OVERVIEW

A CUSTOMER SERVICE SPECIALIST WILL BE ABLE TO UNDERSTAND AND HAVE KNOWLEDGE OF:

BUSINESS KNOWLEDGE AND UNDERSTANDING

- Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation
- Understand the impact your service provision has on the wider organisation and the value it adds
- Understand your organisation's current business strategy in relation to customers and make recommendations for its future
- Understand the principles and benefits of being able to think about the future when taking action or making service related decisions
- Understand a range of leadership styles and apply them successfully in a customer service environment

CUSTOMER JOURNEY KNOWLEDGE

- Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience
- Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention
- Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation
- Understand commercial factors and authority limits for delivering the required customer experience

KNOWING YOUR CUSTOMERS AND THEIR NEEDS/ CUSTOMER INSIGHTS

- Know your internal and external customers and how their behaviour may require different approaches from you
- Understand how to analyse, use and present a range of information to provide customer insight
- Understand what drives loyalty, retention and satisfaction and how they impact on your organisation
- Understand different customer types and the role of emotions in bringing about a successful outcome
- Understand how customer expectations can differ between cultures, ages and social profiles

CUSTOMER SERVICE CULTURE AND ENVIRONMENT AWARENESS

- Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers
- Understand your business environment and culture and the position of customer service within it
- Understand your organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong
- Understand how to find and use industry best practice to enhance your own knowledge

SKILLS OVERVIEW

A CUSTOMER SERVICE SPECIALIST WILL BE ABLE TO DEMONSTRATE THE FOLLOWING SKILLS WITHIN THE CONTEXT OF THE ORGANISATION:

BUSINESS-FOCUSED SERVICE DELIVERY

- Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice
- Resolve complex issues by being able to choose from and successfully apply a wide range of approaches
- Find solutions that meet your organisations needs as well as the customer requirements

PROVIDING A POSITIVE CUSTOMER EXPERIENCE

- Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes.
- Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy
- Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps
- Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction
- Demonstrate a cost conscious mind-set when meeting customer and the business needs
- Identifying where highs and lows of the customer journey produce a range of emotions in the customer
- Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format

WORKING WITH YOUR CUSTOMERS/ CUSTOMER INSIGHTS

- Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it
- Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service

CUSTOMER SERVICE PERFORMANCE

- Maintain a positive relationship even when you are unable to deliver the customer's expected outcome
- When managing referrals or escalations take into account historical interactions and challenges to determine next steps

SERVICE IMPROVEMENT

- Analyse the end to end service experience, seeking input from others where required, supporting development of solutions
- Make recommendations based on your findings to enable improvement
- Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice



BEHAVIOURS OVERVIEW

A CUSTOMER SERVICE SPECIALIST WILL BE ABLE TO DEMONSTRATE THE FOLLOWING BEHAVIOURS:

BEHAVIOURS

Develop self

- Proactively keep your service, industry and best practice knowledge and skills up-to-date
- Consider personal goals related to service and take action towards achieving them

Ownership/ Responsibility

- Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation
- Exercises proactivity and creativity when identifying solutions to customer and organisational issues
- Make realistic promises and deliver on them

Team working

- Work effectively and collaboratively with colleagues at all levels to achieve results.
- Recognise colleagues as internal customers
- Share knowledge and experience with others to support colleague development

Equality

- Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer
- Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment

Presentation

- Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction
- Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand

EPA GATEWAY

END-POINT-ASSESSMENT GATEWAY READINESS

The EPA will be triggered by the following events:

- the minimum time duration allocated to the Standard has been met;
- judgement of readiness to go beyond the gateway is the decision of the Employer based on completion of all on-programme requirements.
- the apprentice believes they are ready to submit, to the EPAO, a selection of exemplary evidence, in their portfolio, which fulfil the knowledge, skills and behavioural practice in relation to the Standard.
- the employer to confirm that the portfolio is ready to submit to the EPAO
- the EPAO confirms that the portfolio has been received
- successful completion of English and maths: a minimum Level 2 qualification in English and mathematics is for this apprenticeship and must be achieved prior to the End-point Assessment (EPA), and confirmed by the employer.

END-POINT-ASSESSMENT

END-POINT-ASSESSMENT METHODS

The end-point-assessment consists of three assessment methods:

1. Practical observation with Q&A
2. Work based project, supported by an interview
3. Professional discussion

PRACTICAL OBSERVATION WITH Q&A

The practical observation is covered in one session, lasting 1 hour +/- 10% tolerance either way.

The apprentice must be observed, by an independent assessor, undertaking a range of day to day workplace activities. The observation should involve activities which allow the apprentice to demonstrate the full range of their knowledge, skills and behaviours required.

The observation must include questioning to clarify knowledge and understanding is being applied. Standardised questions must be devised by the EPAOs to explore the apprentice's knowledge, skills and behaviour related to the KSBs. Questions must be open questions and independent assessors may ask supplementary questions as required to seek further clarification. Supplementary questions will be devised by the independent assessor as required.

During the practical observation the apprentice should have the opportunity, if required, to move from one area/function of the business to another in order to best demonstrate how they have applied their KSBs in a realistic work environment to achieve genuine and demanding work objectives.

The independent assessor must plan the practical observation in conjunction with the apprentice and their employer, taking account of workplace considerations. This would typically include timing, the right environment and enough space for the apprentice to be able to do their job.

The practical observation must take place in the apprentice's workplace. The amount of questioning time carried out during the observation should not exceed 15% of the total time allowed for the practical observation.

The practical observation must:

- Reflect typical working conditions.
- Allow the apprentice to demonstrate all aspects of the standard being assessed.
- Take a synoptic approach to assessment the overall competence.
- Be carried out on a one-to-one basis.

The apprentice must be given 2 weeks' notice of the practical observation. The observation can be before or after the work-based project but it is recommended not before the professional discussion.

Independent assessors must grade the practical observation as fail, pass or distinction using the grading criteria.

WORK BASED PROJECT

Apprentices must submit a written report, on a project they have carried out, to their EPAO 2 weeks prior to an interview date. This date will be agreed when the apprentice passes through the Gateway process.

The written report must be 2500 words (+/- 10%), excluding annexes. All work on the project will be undertaken following the Gateway process over a two-month period.

The subject of the project report should be agreed with the EPAO with guidance from the employer in order to allow them to comment on appropriateness for their business. The subject should cover a specific high-level challenge (such as a complaint or difficult situation) that the apprentice has dealt with explaining what it was, what actions (planning and execution) they took, what solutions were offered, details of any recommendations made to change a policy or process and any feedback from the customer. Details should also include the apprentice's responsibilities and results.

The report should contain annexes that are attributable to the apprentice and the actions they took. Example evidence could be emails, letters, meeting notes, call logs, workflow documents or, feedback.

Although there is flexibility in the order in which each assessment method is carried out, it is recommended that the written work-based project takes place before the professional discussion.

The work-based project is designed to ensure the apprentice's learning meets the needs of the business and is relevant to their role.

The employer will ensure the apprentice has sufficient time and the necessary resources to plan and undertake the research and produce the written report.

Interview to Support the Work Based Project

The work-based project will be supported by an interview.

- The interview will take place with an independent assessor.
- The interview will last for 60 minutes (+/- 10%)
- The interview will focus on the written project and any supporting annexes.
- The interview can take place either face-to-face or via online video conferencing, if appropriate. EPAOs must ensure that the interview and questioning elements are conducted in a suitable controlled environment. i.e. a quiet room, free from distraction and influence, with the necessary equipment for each assessment method. It is anticipated that EPAOs will use the apprentice's employer's premises, wherever possible, to minimise costs.
- The apprentice will be asked 10 questions.
- Independent assessors must grade the work-based project and interview holistically as fail, pass or distinction using the grading criteria as the apprentice's responses in the interview will be assessed in addition to the content of work-based project.
- The independent assessor must use the assessor tools and procedures that are set by the EPAO to record the interview.

In line with best practice, but not mandatory, a representative from the organisation could also be present but only to observe and they should not be involved in conducting the interview or grading decision. Any recommendations may not have been considered by the organisation's leaders and decision makers and there is potential opportunity for organisations to implement real change based on the apprentice's research, findings and recommendations.

PROFESSIONAL DISCUSSION

The professional discussion will last for 60 minutes (+/- 10%).

During the professional discussion, evidence from the on-programme portfolio of evidence will be used as a base to support the professional discussion.

The apprentice will extract, from their portfolio, evidence which is suitable for supporting them in their professional discussion. This evidence will consist of a minimum of 10 pieces of evidence to a maximum of 15 pieces and related to the standards which apply to the professional discussion. This could include witness statements, customer feedback such as emails or letters, manager feedback from one-to-one or alike. The portfolio of evidence is not directly assessed.

Apprentices must submit the requested portfolio of evidence (10-15 pieces) to their EPAO 2 weeks prior to the professional discussion date. This date will be agreed when the apprentice passes through Gateway process. This evidence will be considered by the independent assessor and use for the planning to the discussion.

The professional discussion can be either face-to-face or via online video conference, if appropriate. EPAOs must ensure that it is conducted in a suitable controlled environment. I.e. a quiet room, free from distraction and influence.

Independent assessors must grade the professional discussion as fail, pass or distinction using the grading criteria.

COSTS

This programme costs £4,000 and is covered through a companies Apprenticeship Levy.

If the employer does not pay into the levy they will only pay £200 if they have more than 50 employees or if the apprentice is aged 19+. Employers with less than 50 employees receive full funding if the apprentice is aged 16-18.



MORE INFORMATION

www.learningskillspartnership.com
info@learningskillspartnership.com

