



Specification

Level 3 Customer Service Specialist v1.3

Table of Contents

Innovate Awarding	3
The Apprenticeship Standard and Assessment Plan	4
The Apprentice	5
Off-the-Job Training	5
Gateway	6
Portfolio of Evidence Guidance	8
End-Point Assessment	9
Grading	13
Grading Descriptors	14
Annex 1: Assessment Plan and Occupational Standard	22
Annex 2: Additional Information	22

Innovate Awarding

Meet our Managing Director

Welcome to the Level 3 Customer Service Specialist Apprenticeship.

We are an Ofqual approved End-Point Assessment Organisation (EPAO), experienced in operating within a regulated market. Driven by the employers we work in partnership with, we deliver End-Point Assessment (EPA) in the Health, Care, Education, Leadership, Management, Leisure, Customer Service, Creative, Hospitality, Retail, Transport and Logistics sectors.

Delivering an apprenticeship is an extremely rewarding role. We recognise the need for a clear specification, resources and support, so more valuable time can be spent delivering to an apprentice.

At Innovate Awarding we stand by our 'no surprises' approach to assessment, making an apprenticeship journey as simple as possible, ensuring the best chance of success for every apprentice who undertakes EPA with us.

Charlotte Bosworth

About Innovate Awarding

We are an EPAO approved by the Education and Skills Funding Agency (ESFA) with a collaborative approach to doing business. We work with providers to deliver fit for purpose EPA, providing assessments for a wide range of apprenticeship standards, certificating thousands of apprentices, continuing to learn and improve with each experience.

We have experienced and responsive teams to ensure the EPA experience is smooth and efficient, working closely with our provider partners ensuring a 'no surprises' approach to EPA for all apprentices.

Please see our website for the range of Standards we are approved to deliver:

<https://innovateawarding.org/end-point-assessment/apprenticeship-standards/>

The Apprenticeship Standard and Assessment Plan

An Apprenticeship Standard details the knowledge, skills and behaviours required to be occupationally competent:

- **Knowledge** - the information, technical detail, and 'know-how' that someone needs to have and understand to successfully carry out the duties. Some knowledge will be occupation-specific, whereas some may be more generic.
- **Skills** - the practical application of knowledge needed to successfully undertake the duties. They are learnt through on and/or off-the-job training or experience.
- **Behaviours** - mindsets, attitudes or approaches needed for competence. Whilst these can be innate or instinctive, they can also be learnt. Behaviours tend to be very transferable. They may be more similar across occupations than knowledge and skills. For example, team worker, adaptable and professional.

Apprenticeships are an invaluable tool for upskilling in areas that matter most to employers. They are a highly effective route to recruit and train future talent, address skills shortages and develop careers across core parts of the business.

The Level 3 Customer Service Specialist apprenticeship has been developed by employers working in the sector detailing the knowledge, skills and behaviours required to be occupationally competent and outlining the training and assessment journey for an apprentice.

The apprentice will typically spend 15 months on-programme, working towards the Level 3 Customer Service Specialist Standard, combining practical training in a job with study. The extent of the on-programme time should be decided for each apprentice based on their prior learning, skills and experience. If employers are using this Standard for an existing employee, it is important to be aware that the role must represent new learning. Providers should support employers with this.

It is vital the apprentice is prepared and fully ready before they commence their EPA period, which is detailed in the Assessment Plan.

The EPA period will last three months, consisting of:

- Practical Observation with Questions and Answers
- Work-based Project Report supported by an Interview
- Professional Discussion supported by Portfolio Evidence

The Apprentice

The main purpose of a customer service specialist is to be a 'professional' for direct customer support within all sectors and organisation types. They are an advocate of Customer Service who acts as a referral point for dealing with more complex or technical customer requests, complaints, and queries.

They are often an escalation point for complicated or ongoing customer problems. As an expert in their organisation's products and/or services, they share knowledge with their wider team and colleagues.

They gather and analyse data and customer information that influences change and improvements in service. Utilising both organisational and generic IT systems to carry out their role with an awareness of other digital technologies. This could be in many types of environments including contact centres, retail, webchat, service industry or any customer service point.

Off-the-Job Training

Off-the-job training is a statutory requirement for an English apprenticeship. It is training, which is received by the apprentice during the apprentice's normal working hours, for the purpose of achieving the knowledge, skills and behaviours of the approved apprenticeship the learner is completing.

It is an important aspect of apprenticeship training, as it gives the learner time to properly develop knowledge and skills from the programme.

Off-the-job training allows the learner to take full advantage of the programme, improving the return on investment in training costs for the employer. A developed and upskilled apprentice will lead to an increase in productivity, a clear benefit to the business.

Examples of off-the-job training include:

- Learning new skills at work through shadowing other members of the team, where this activity has been agreed and documented as part of the agreed training plan
- In-house training programmes relevant to the apprenticeship
- Coaching sessions
- Attendance at workshops, training days and webinars relevant to the apprenticeship

- Completion of online learning
- Self-study that includes reading or watching videos
- Training in new working practices or new equipment
- Role-playing or simulation exercises
- Industry visits/conferences relevant to apprenticeships
- Writing assessments, assignments and completing projects or activities
- Practical training or training in the workplace relevant to the apprenticeship

Gateway

Gateway is the entry point to EPA, and it is vital that all parties understand its importance. It is the point at which the apprentice has completed their learning, met the requirements of the Level 3 Customer Service Specialist Apprenticeship Standard, and the provider and employer have reviewed the apprentice's knowledge, skills and behaviours to confirm they satisfied the provider and employer that they are competent and ready to enter their EPA.

Employers are ultimately responsible for deciding when their apprentice is competent as a Customer Service Specialist and ready to enter EPA. This decision should be taken after conversation with the provider and apprentice. It is vital this decision is based on each individual apprentice's readiness and not because they have reached the end of the initially agreed training period.

Pre-Gateway Checks

Knowing when an apprentice is Gateway-ready is much more than simply checking the apprentice has completed their learning and obtained all the mandatory requirements outlined in the Level 3 Customer Service Specialist Assessment Plan. Although this is important, it is about the provider, apprentice and employer being convinced that the apprentice is at the level of competence set out in the Standard and that they are prepared for the EPA, so they can claim that competency.

To pass through Gateway, typically the apprentice will have been training for a minimum of 12 months. They must also have:

- Achieved Level 2 English and Maths
- Satisfied the employer that they are consistently working at, or above, the occupational competence of the Level 3 Customer Service Specialist Standard
- Compiled, and be ready to submit, a portfolio of between 10 and 15 discrete pieces of evidence towards the professional discussion

- Completed and be ready to submit a project synopsis
- A signed declaration
- Declared any reasonable adjustments and special considerations

Readiness for Gateway includes confirming that the apprentice's portfolio meets the requirements of the knowledge, skills and behaviours set out within the Level 3 Customer Service Specialist Standard. This will be confirmed at Gateway and documented on epaPRO. This notifies us that the apprentice is ready for their assessment and the EPA planning meeting will be organised.

What Happens During Gateway?

During the two weeks of Gateway, Innovate Awarding will agree the project synopsis, ensuring there is sufficient scope to meet the KSBs mapped to Assessment Method 2, enabling the apprentice to stand the best chance of achievement.

A template is available for the project synopsis. This must scope out the work-based project and should include a summary of the stages to be covered by the work-based project and an overview of the tasks as well as the specific responsibilities and duties assigned and to be undertaken by the apprentice.

Assessment Booking

Applications for any reasonable adjustments and/or special considerations should be submitted prior to Gateway, to allow time to review the request before the planning meeting.

The planning meeting will be booked on epaPRO once Gateway documents have been reviewed and approved by us. The planning meeting will take place between the apprentice and an Innovate Awarding representative. The employer should also be present.

The purpose of the meeting is to allocate an Innovate Awarding Assessor, discuss assessment dates, confirm assessment timings, assessment requirements and assessment preparation. During the meeting we will discuss what happens if assessments are cancelled/rescheduled and how this could impact the EPA period, as well as providing information on certification and appeals.

The Level 3 Customer Service Specialist 30-minute planning meeting will book assessment timeslots for the:

- Practical observation with questions and answers
- Work-based project supported by an interview
- Professional discussion supported by portfolio evidence

After the planning meeting, the apprentice will receive an email confirming everything discussed in the meeting and a calendar invite for all booked assessments. The apprentice will then prepare for EPA.

Portfolio of Evidence Guidance

Employers will ensure their apprentice has compiled a portfolio of evidence during the on-programme period of the apprenticeship, which will be submitted at Gateway. It underpins the professional discussion but will not be assessed by us.

We will review the portfolio of evidence in preparation for the professional discussion prior to Gateway. Feedback is not required, although generally if Gateway is rejected due to the portfolio of evidence being inadequate, a courtesy email will be sent with an explanation, including the rejection reason on epaPRO.

Portfolio of evidence content and format are typically Word documents, presentations, video or audio recordings. You will upload the portfolio of evidence to epaPRO at Gateway, either by inserting a link to a SharePoint or including a zip file.

Portfolio of evidence requirements:

- Apprentices must compile a portfolio of evidence during the on-programme period of the apprenticeship
- It must contain evidence related to the knowledge, skills and behaviours (KSBs) that will be assessed by the professional discussion
- The portfolio of evidence will contain 10 to 15 discrete pieces of evidence
- Evidence must be mapped against the KSBs
- Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to a quantitative approach is suggested

Evidence sources may include:

- Observations (completed by your on-programme assessor (written or voice recorded)
- Performance reviews/personal development plans (completed with your employer)
- Ongoing professional discussions on projects and assignments (completed by your on-programme assessor/line manager (written or voice recorded)
- Feedback from line managers, peers and direct reports
- Reports
- Presentations

- Work product evidence (with additional explanations of the task/s completed and the role the apprentice took)
- Project work
- Witness statements supporting your work
- Customer feedback
- Correspondence with customers/other teams showing how customer service issues were resolved
- Referrals of issues to other teams/departments
- Correspondence showing how you shared your knowledge and experience with others (this could include guidance you have developed for others)
- Evidence of one-to-ones with other teams/other colleagues
- Correspondence relating to how complex customer service issues were dealt with
- Evidence of attendance at study days and training courses with reflective notes

What not to include:

- Workplace policies and procedures
- Other individual certificates of training without reflective notes
- Research information such as information from the internet and handouts
- Personal documents such as job descriptions and contracts
- Confidential supervision and appraisal notes
- Evidence from other sources that haven't been referenced correctly

End-Point Assessment

Assessment Methods

Assessment Method 1: Practical Observation with Questions and Answers

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

The apprentice will be observed, by an Innovate Awarding Assessor, undertaking a range of day-to-day workplace activities. The observation will 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. Open questions will be asked by the Innovate Awarding Assessor. They may also ask supplementary questions as required to seek further clarification.

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 Innovate Awarding Assessor will 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.

Assessment Method 2: Work-based Project Supported by an Interview

Apprentices must submit a written report, on a project they have carried out, to Innovate Awarding two weeks prior to the interview date. This must be accompanied by the Project Evidence Locator. 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 Innovate Awarding Assessor with guidance from their employer in order to for them to comment on appropriateness for their business, but the Innovate Awarding Assessor will make a decision to ensure consistency.

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.

Interview to Support the Work Based Project

The work-based project will be supported by an interview. The interview will take place with an Innovate Awarding 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. The Innovate Awarding Assessor will 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 the Innovate Awarding Assessor will use the apprentice's employer's premises, wherever possible, to minimise costs. The interview will consist of competency-based questions. The apprentice will be asked 10 questions.

The Innovate Awarding Assessor will grade the work-based project and interview holistically as fail, pass or distinction.

In line with best practice, but not mandatory, a representative from the employer's 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.

Assessment Method 3: Professional Discussion supported Portfolio Evidence

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. This evidence will be considered by the Innovate Awarding Assessor and will be used for the planning to the discussion. The professional discussion can be either face-to-face or via online videoconference, if appropriate. The Innovate Awarding Assessor will ensure that it is conducted in a suitable controlled environment. I.e. a quiet room, free from distraction and influence. It is anticipated that the Innovate Awarding Assessor will use the apprentice's employer's premises, wherever possible, to minimise costs.

Grading

Performance in the EPA determines the apprenticeship grade of:

- Distinction
- Pass
- Fail

The Innovate Awarding Assessor will grade the Practical Observation with Questions and Answers, Work-based Project supported by an Interview and the Professional Discussion supported by the Portfolio of Evidence.

Innovate Awarding will combine the individual assessment method grades to determine the overall EPA grade.

To achieve an overall distinction, the apprentice must achieve distinction in all the assessment methods.

To achieve an overall pass, the apprentice must achieve at least a pass in all the assessment methods.

Grading Descriptors

Assessment Method 1: Practical Observation with Questions and Answers

Assessed Criteria	Pass Grading Descriptor	Distinction Grading Descriptor
K11 How to analyse, use and present a range of information to provide customer insight.	An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.	Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.
K13 Understand different customer types and the role of emotions in bringing about a successful outcome	Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.	Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.
K14 Understand how customer expectations can differ between cultures, ages and social profiles.	Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction.	
K15 Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers.	An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.	
S3 Find solutions that meet your organisation's needs as well as the customer requirements	Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.	
S4 Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes.	Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.	

<p>S5 Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy.</p>	<p>Recognises when customer emotions have been affected by the level of service offered.</p>	
<p>S6 Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps.</p>	<p>Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.</p>	
<p>S9 Identify where highs and lows of the customer journey produce a range of emotions in the customer.</p>	<p>Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.</p>	
<p>S10 Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format.</p>	<p>Evidences when they have maintained a positive relationship even when they are unable to deliver the customer's expected outcome.</p>	
<p>S13 Maintain a positive relationship even when you are unable to deliver the customer's expected outcome.</p>	<p>Evidences how they recognise when customer expectations are not met and demonstrates how, using appropriate communication techniques, this could be managed to maintain a positive relationship.</p>	
<p>S14 When managing referrals or escalations take into account historical interactions and challenges to determine next steps.</p>	<p>Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.</p>	
<p>B3 Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation.</p>	<p>Shows proactivity and creativity when identifying solutions to customer and organisational issues.</p>	
<p>B4 Exercises proactivity and creativity when identifying solutions to customer and organisational issues.</p>	<p>Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on</p>	

<p>B6 Work effectively and collaboratively with colleagues at all levels to achieve results.</p>	<p>them in line with organisational policy and procedures.</p> <p>Demonstrates achievement of results through effective team work and collaboration with colleagues at all levels.</p>	
<p>B7 Recognise colleagues as internal customers.</p>	<p>Shows adaptability of own skills when working with internal customers.</p>	
<p>B9 Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer.</p>	<p>Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.</p>	
<p>B10 Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment.</p>	<p>Evidence to show how their personal presentation made a positive impact on their organisation's brand.</p>	
<p>B11 Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.</p>	<p>Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.</p>	
<p>B12 Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand.</p>	<p>Demonstrates how they analyse, use and present a range of information in order to provide customer insight.</p>	

Assessment Method 2: Work-based project (supported by interview)

Assessed Criteria	Pass Grading Descriptor	Distinction Grading Descriptor
K1 Understand your organisation's current business strategy in relation to customers and make recommendation for its future.	Evidence that they understand the impact of the organisation's mission statement and business strategy on customer service delivery and make recommendations for future improvements.	Evidence to support their research and analysis of customer service standards and mission statements of other organisations, in comparison to their own organisations, to inform their recommendations.
K3 Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation.	Ability to recommend improvement to the customer service provision, the steps required to implement this change and the benefit this change could have on the organisation and their own role.	Ability to consider the possible impact on their organisation of not considering the future in decision-making.
K4 Understand the principles and benefits of being able to think about the future when taking action or making service related decisions.	Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.	Demonstrates how knowing their customer and their needs has a direct impact on: <ol style="list-style-type: none"> their working practices organisational policy / procedures
K6 Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience.	An understanding of the underpinning business processes that support them on bringing about the best outcome for customers and their organisation.	Ability to demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation.
K8 Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation.	Provides evidence to show how they identify information which can be used by their organisation to provide customer insight and identify how this information can be analysed, used and presented.	Ability to identify and recognise when

<p>K16 Understand your business environment and culture and the position of customer service within it.</p>	<p>Ability to discuss the internal and external factors influencing their business environment and culture.</p> <p>Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery.</p>	<p>problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s).</p>
<p>K17 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.</p>	<p>Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.</p>	<p>Provides evidence to show when they analyse the risks and opportunities to implementing change.</p>
<p>S1 Demonstrate a continuous improvement and future focused approach to customer service delivery including decision making and providing recommendations or advice</p>	<p>Ability to identify potential causes of service failure and the consequences of these.</p> <p>Evidences when they made decisions and recommendations to improve their own customer service delivery.</p>	<p>Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended alternative methods likely to improve results, stating reasons for choice.</p>
<p>S7 Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction.</p>	<p>Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.</p>	<p>Evidence to show when they have proactively gathered customer feedback, through a variety of methods and used alternative recommendations to change the customer service level agreement in order to provide an improved service.</p>
<p>S11 Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it.</p>	<p>Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements.</p>	<p>Demonstrates an ability to identify trends/recurring issues and analyse why they occurred and record possible ways of addressing them to ensure they do not reoccur.</p>
<p>S12 Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service.</p>	<p>Ability to gather and analyse information about the types of customers their organisation has and explain how the service they provide meets their potential needs and expectations.</p>	

<p>S15 Analyse the end to end service experience, seeking input from others where required supporting development of solutions.</p>	<p>Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.</p>	
<p>S16 Make recommendations based on your findings to enable improvement.</p>	<p>Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required.</p>	
<p>S17 Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice.</p>	<p>Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.</p>	

Assessment Method 3: Professional discussion (supported by portfolio evidence)

Assessed Criteria	Pass Grading Descriptor	Distinction Grading Descriptor
K2 Understand the impact your service provision has on the wider organisation and the value it adds	Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments. Evidence of how they identify the different types of leadership styles that work best in their customer environment.	Evidences when they have assessed the impact of sharing their own knowledge on: a. their development b. colleague development
K5 Understand a range of leadership styles and apply them successfully in a customer service environment	Demonstrates when they have balanced the meeting of their customer and their organisation's needs while showing they have considered cost implications.	Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach.
K7 Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention	Demonstrate sharing own knowledge and experience with others, to support colleague development.	
K9 Understand commercial factors and authority limits for delivering the required customer experience	Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.	
K10 Know your internal and external customers and how their behaviour may require different approaches from you	Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.	
K12 Understand what drives loyalty, retention and satisfaction and how they impact on your organisation	Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations.	

<p>K18 Understand how to find and use industry best practice to enhance own knowledge</p>	<p>Demonstrates responsibility and ownership in resolving customer issues, by getting the right people involved and delivering on promises, to the satisfaction of the customer and their organisation.</p>	
<p>S2 Resolve complex issues by being able to choose from and successfully apply a wide range of approaches</p>	<p>Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.</p>	
<p>S8 Demonstrate a cost-conscious mind-set when meeting customer and the business needs</p>	<p>Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.</p>	
<p>B1 Proactively keep your service, industry and best practice knowledge and skills up to date</p>	<p>Evidences knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development.</p>	
<p>B2 Consider personal goals related to service and take action towards achieving them</p>	<p>Provides evidence to demonstrate how they have achieved learning and development goals, identified in an agreed personal development plan, in relation to their knowledge and skills of customer service, in the industry and best practice.</p>	
<p>B5 Make realistic promises and deliver on them</p>		
<p>B8 Share knowledge and experience with others to support colleague development</p>		

Annex 1: Assessment Plan and Occupational Standard

The Level and Standard Occupational Standard and the latest version of the Assessment Plan can be accessed by following this link:

[Customer Service Specialist v1.3/Institute for Apprenticeships and Technical Education](#)

Level 3 Customer Service Specialist ST0071
Version 1.3
Sector: Sales, Marketing and Procurement
EQA Organisation: Ofqual

Annex 2: Additional Information

Results and Certifications

All final assessment component results are published on EPAPro within **seven working days** of the assessment taking place.

We will submit a certificate claim with the ESFA within 15 working days after the final result has been uploaded to EPAPro. The ESFA will send the certificate directly to the employer.

For replacement certificates a request must be emailed to epa@innovateawarding.org. Within two days of receiving the email, a replacement certificate will be requested from the ESFA.

Re-sits and Re-takes

If an apprentice fails any part of the end-point assessment, further development must be provided prior to a re-sit or re-take.

A re-take requires the apprentice to undertake further learning and therefore they would need to go through the Gateway process again. They can retake/re-sit any individual assessment component where a pass has not been achieved. If a retake/re-sit is required, the apprentice should complete the retake/resit within 12 months.

There is no limit to the number or retake/re-sits within the 12 months.

The apprentice cannot retake/re-sit any part of the EPA to increase their grade from a pass to a distinction. The maximum grade awarded to a re-sit will be pass, unless the Innovate Awarding Assessor identifies exceptional circumstances accounting for the original fail.

If the apprentice fails the work-based project, they will be asked to rework their work-based project taking account of feedback from their Innovate Awarding Assessor. The apprentice will have one month to rework their submission.

Reasonable Adjustments, Special Considerations and Appeals

Information on reasonable adjustments, special considerations and the appeals process can be accessed by using this link:

<https://innovateawarding.org/end-point-assessment/apprentice-information>

Version Record

Innovate Awarding continuously review all support material to ensure its accuracy. All amendments will be recorded in the Version Record.

Version Number	Effective From	Reason for Change	Location

Please ensure that you use the current version.

All enquiries relating to the version change of the document should be directed to epa@innovateawarding.org



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