



## **STANDARD ASSESSMENT SPECIFICATION**

Level 3  
Customer Service Specialist

### Change Control Sheet

Innovate Awarding will continuously review all support material to ensure its accuracy. All amendments will be recorded on the below change control table. New and updated support material will be listed on the dashboard section of EPA Pro. Please ensure that you are using the most up-to-date version. Any enquiries about this process can be directed to [EPA@innovateawarding.org](mailto:EPA@innovateawarding.org)

VERSION NUMBER	DATE UPLOADED	DESCRIPTION OF REVISION	PAGE AFFECTED
Version 6	20/04/2021	Change to the layout as a result of rebrand of the document	Whole document
Version 7	25/05/2023	Delivery Content and Guidance	

### Disclaimer note

Information made accessible through this document is as provided from the current published standard and assessment plan.

Guidance throughout our specification will be subject to final amends once there is an updated published standard and assessment plan.

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## Introduction

### Innovate Awarding

Innovate Awarding is an End-point Assessment Organisation (EPAO) approved by the Education and Skills Funding Agency (ESFA) and a nationally regulated Awarding Organisation with a collaborative approach to doing business. We work with employers and training providers to deliver fit for purpose End-point Assessment and qualification services in a number of sectors.

For further information, please see our website: [www.innovateawarding.org/apprenticeship-standards/end-point-assessment](http://www.innovateawarding.org/apprenticeship-standards/end-point-assessment).

## Apprenticeship overview

The Customer Service Specialist apprenticeship is designed to provide the knowledge, skills and behaviours required by those working in and supporting individuals in Customer Service.

STANDARD NAME	Customer Service Specialist
LEVEL	3
SECTOR	Customer Service
PROGRAMME DURATION	15 – 21 months
MINIMUM TIME ON PROGRAMME	15 months
EPA DURATION	3 months maximum
EPA METHODS	<ul style="list-style-type: none"> <li>• Practical observation with question and answers</li> <li>• Work-based project supported by an interview</li> <li>• Professional discussion supported by portfolio evidence</li> </ul>
OUTCOMES	Fail, Pass, Distinction
EXTERNAL QUALITY ASSURING CENTRE	Ofqual

### Who is the apprenticeship for?

Customer service specialists offer direct customer support within all sectors and organisation types. They support the Customer Service department and act 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 the organisation's products and/or services, they share knowledge with the wider team and colleagues. They gather and analyse customer information that influences change and improvements in service. A Customer Service Specialist utilises both organisational and generic IT systems to carry out the role. This could be in many types of environment, including contact centres, retail, webchat, service industry or any customer service point.

## Role of Innovate Awarding

Innovate Awarding is the End-point Assessment organisation that will complete all aspects of the End-point Assessment requirements for the apprenticeship. Innovate Awarding will provide information on the processes that enable employers and training providers to support the apprentice to achieve the End-point Assessment.

## Support materials

Support materials provided include:

- Guides for assessment methods
- Assessment specifications
- Assessment manual
- Full mock documentation
- Assessment guides
- Videos of assessments

## On Programme Requirements

The on-programme learning and development will be agreed between the training provider and employer or internally if training is delivered by an employer-training provider.

For this standard, the following are mandated:

- completion of Level 2 Literacy and Numeracy;
- apprentices must develop and maintain examples of their work throughout their apprentice, within a portfolio

For this standard, the following is also recommended:

- employers should use their normal performance management process to monitor the progress of the apprentice, provide feedback and guide development
- employers and providers should carry out joint reviews of progress at regular interviews

## Gateway

To qualify for End-point Assessment, an apprentice must pass through the gateway. To do this, they need to be able to evidence:

- Level 2 Literacy and Numeracy.

The employer and training/employer provider must confirm that all the requirements have been met and that the apprentice is ready to complete the End-point Assessment before they can pass through the gateway. This includes confirming that the apprentice's portfolio meets the requirements of the knowledge, skills and behaviours set out within the standard. This will be confirmed at the gateway sign-off and documented on EPA Pro. This notifies Innovate Awarding that the apprentice is ready for End-point Assessment and the assessment planning will be organised.

## Module Overview

The modules are the titles of the knowledge and skills listed in the standard.

MODULES	ASSESSMENT METHODS		
	Practical observation with question and answers	Work-based project supported by an interview	Professional discussion supported by portfolio evidence
Business knowledge and understanding		✓	✓
Customer journey knowledge		✓	✓
Knowing your customers and their needs / Customer insights	✓		✓
Customer service culture and environment	✓	✓	✓
Business focused service delivery	✓	✓	
Providing a positive customer experience	✓	✓	✓
Working with your customers / Customer insight		✓	
Customer service performance	✓	✓	
Service improvement		✓	✓
Develop self			✓
Ownership/responsibility	✓		✓
Team working	✓		✓
Equality	✓		
Presentation	✓		

## End-point Assessment

The End-point Assessment requires the apprentice to demonstrate that they have achieved all requirements of the apprenticeship standard.

### What will the End-point Assessment look like?

A planning meeting will take place once the gateway has been passed and the apprentice has been deemed ready for the End-point Assessment.

The purpose is to:

- plan when the assessments will take place
- identify the requirements of each assessment method
- answer any questions or concerns the apprentice may have about the assessment process
- aid in the preparation requirements for End-point assessment (e.g. arranging access, facilities and resources)

## **What are the Assessment Methods?**

Achievement of this standard requires apprentices to be assessed using three assessment methods.

### **Practical observation with question and answers**

The practical observation will be conducted by the End-point Assessor within the apprentice's organisation. The apprentice will be given at least two weeks' notice prior to the date of the assessment. The observation must last for 1 hour with +/- 10% tolerance. The time for questioning will not exceed 15% of the total time allowed for the 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 of the overall competence;
- Be carried out on a one-to-one basis.

The observation will be planned by the End-point Assessor, in conjunction with the apprentice and employer, to account for workplace considerations. The apprentice may need to move between different areas/functions to allow them to show the full range of knowledge, skills and behaviours required. The observation will cover a range of knowledge, skills and behaviours aligned to the assessment.

### **Work-based project supported by an interview**

This is a 2500 word (+/- 10%, excluding annexes) written report on a project completed by the apprentice. The apprentice will have 2 months from the date of achieving the gateway to complete the project and submit the written report to the End-point Assessor. The interview must be scheduled a minimum of 2 weeks after the project has been submitted to the End-point Assessor.

It is recommended that the work-based project takes place before the professional discussion. The employer is required to ensure that the apprentice has sufficient time and the resources to plan the research, understand the findings and produce the written report.

The subject of the project must be agreed with the End-point Assessor before the apprentice commences work on the project. The employer should guide the apprentice to ensure the project is appropriate within the organisation. The apprentice will need to complete and submit the Project Synopsis document at the gateway. This will be reviewed by the End-point Assessor and they will communicate with the apprentice to confirm appropriateness.

The assessment plan highlights that the project's "subject should cover a 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 include the apprentice's responsibilities and results." Therefore, it is expected that the subject will be a real-life issue and will result in recommendations to change existing policies or processes to ensure future issues do not occur. The situation that the apprentice is using within their report must be something that has happened while they have been on their Customer Service Specialist apprenticeship.

The project will be supported by a 60-minute interview (+/- 10%). A representative of the employers' organisation can be present during the interview, but they cannot be involved in the interview or the grading and must only observe. Their presence is to understand the recommendations made within the project to allow potential opportunity to implement real change based on the apprentice's recommendations.

The interview will focus on the written report and supporting annexes and will take place either face-to-face or via online video conferencing. The interview must be conducted in a suitable controlled environment e.g., a quiet room free from distractions and influence. The apprentice will be asked 10 questions by the End-point Assessor that will cover the knowledge and skills criteria to be covered by the assessment.

### **Professional Discussion supported by portfolio evidence**

The professional discussion will cover the knowledge, skills and behaviours aligned to the assessment. The professional discussion will last for 60 minutes, +/- 10%

The professional discussion will be undertaken by the End-point Assessor and the apprentice. The apprentice will need to provide between 10 and 15 pieces of evidence from their on-programme portfolio, to support the professional discussion. The evidence from the portfolio will not be directly assessed.

Types of evidence could include:

- Witness testimonies
- Customer feedback in the form of emails or letters
- Manager feedback in the form of one-to-ones or appraisals

The evidence from the portfolio must be submitted at the gateway review. The evidence must be submitted with the Professional Discussion Portfolio Referencing Matrix, which should be completed by the apprentice. The professional discussion will take place either face-to-face or via online video conferencing. The professional discussion must be conducted in a suitable controlled environment e.g. a quiet room free from distractions and influence.

# Apprenticeship Standard Amplification

## Module 1 Business knowledge

### ASSESSMENT CRITERIA

Ref	Knowledge Apprentices will need to:	Maps to standard
K1	Explain own organisation's current business strategy in relation to customer service delivery	
K2	Describe the value of own role in meeting customer service standards	
K3	Explain what continuous improvement means in own service environment	
K4	Describe how own recommendations for change impact organisation	
K5	Explain the principles of being able to future plan when making service related decisions to achieve organisational goals	
K6	Describe the benefits of being able to future plan when making service related decisions to achieve organisational goals	
K7	Analyse the impact on own organisation of not considering the future in decision-making	
K8	Compare a range of leadership styles used in a customer service environment	
K9	Describe how to apply leadership styles that work best in own customer service environment	

### DELIVERY CONTENT AND GUIDANCE

Ref	Knowledge	Maps to standard
K1	<p>Apprentices will need to: Evidence they understand the business strategy, including the impact of the organisation's mission statement and business strategy on customer service delivery</p> <p>Business strategy could include: Mission statements, customer service promise, customer charter, customer service standards, brand, brand promise, values, standards, visions, culture, goals and objectives</p>	
K2	<p>Apprentices will need to: Describe their role in meeting their organisation's customer service standards and its impact upon other departments</p> <p>Impact and value could include: Customer retention Customer satisfaction Positive feedback Customer loyalty Customer referrals</p>	

## DELIVERY CONTENT AND GUIDANCE

Ref	Knowledge	Maps to standard
K3	<p>Apprentices will need to:</p> <p>Understand what continuous improvement means and how this is applied in own organisation and role</p> <p>Continuous improvement could include:</p> <ul style="list-style-type: none"> <li>Customer surveys</li> <li>Customer focus groups</li> <li>Customer feedback</li> <li>Comparison to competitors</li> <li>Organisational aims and objectives</li> <li>Appraisals</li> <li>Action planning</li> <li>Training and development</li> </ul>	
K4	<p>Recommendations for change could include:</p> <ul style="list-style-type: none"> <li>Improved customer service promise e.g. timeliness of answering phone calls, meeting customer's expectations, responding to their needs</li> <li>Changes in procedures</li> <li>Changes in customer service provision e.g. more staff at busy times</li> <li>Staff training</li> </ul> <p>Impact on the organisation could include:</p> <ul style="list-style-type: none"> <li>Increased loyalty</li> <li>Increased retention</li> <li>Referrals</li> <li>Increased profitability</li> </ul>	
K5	<p>Apprentices will need to:</p> <p>Explain the requirements of future planning to achieve organisational goals</p> <p>Principles of considering the future could include:</p> <ul style="list-style-type: none"> <li>Recruiting the right people</li> <li>Hire for attitude and train for skills</li> <li>Quality training</li> <li>Staff satisfaction (staff retention)</li> <li>Customer loyalty schemes</li> <li>Long-term commitment to good customer service</li> <li>Senior staff as role models</li> <li>Listen to customer and staff feedback</li> <li>Look at processes from a staff and customer point of view</li> <li>Measure performance</li> <li>e.g. systems such as Net Promotor score</li> </ul>	
K6	<p>Benefits of considering the future could include:</p> <ul style="list-style-type: none"> <li>Retention of customers</li> <li>Customer loyalty</li> <li>Improved customer satisfaction</li> <li>Improved staff satisfaction</li> <li>Right first time</li> </ul>	

## DELIVERY CONTENT AND GUIDANCE

Ref	Knowledge	Maps to standard
K7	<p>The impact of not considering the future could include:</p> <ul style="list-style-type: none"><li>Unexpected outcomes</li><li>Negative outcomes</li><li>Missed opportunities</li><li>Increased expenditure</li><li>Loss of customer/revenue</li><li>Decreased customer/staff satisfaction</li></ul>	
K8	<p>Apprentices will need to:</p> <ul style="list-style-type: none"><li>• Explain two or more leadership styles</li><li>• Explain the features of different leadership styles</li><li>• Describe the benefits and drawbacks of different leadership styles for customer service provision</li></ul> <p>Leadership styles could include: Lewin's Leadership styles, Transformational leadership</p>	
K9	<p>Apprentices will need to:</p> <ul style="list-style-type: none"><li>• Describe how to apply two or more leadership styles</li><li>• Describe how to best apply each leadership style to different customer service environments within own organisation</li></ul>	

## Module 2 Customer journey knowledge

### ASSESSMENT CRITERIA

Ref	Knowledge Apprentices will need to:	Maps to standard
K1	Critically evaluate the customer journeys relevant to own role	
K2	Describe how customer journeys are managed to ensure successful outcomes in own organisation	
K3	Explain the reasons customer issues sometimes need referral or escalation for specialist attention, in line with own organisation's processes	
K4	Explain underpinning business processes related to bringing about the best outcome for own customers and organisation	
K5	Describe commercial factors related to delivering the customer experience required by own organisation	
K6	Explain limits of own authority when delivering customer experience in line with organisational procedures	

### DELIVERY CONTENT AND GUIDANCE

Ref	Knowledge	Maps to standard
K1	<p>Apprentices will need to:</p> <ul style="list-style-type: none"> <li>• Give examples of different customer journeys within their organisation</li> <li>• Critically evaluate the customer journeys of their customers, including challenges and the end-to-end experience</li> </ul> <p>Customer journeys should include:            A definition of the term customer journey e.g. the experiences a customer has with an organisation and the emotional responses they provoke, from their first impression of the environment, to speaking to staff or receiving a service            Customer touch points            Awareness, discover, purchase, use of product or service, bonding with product or service            The importance of the customer journey for effective customer service</p>	
K2	<p>Benefits could include:</p> <p>Customer loyalty            Increased spending            Increased referrals            Better working environment            Minimising negative customer experiences by identifying key points where the correct information should be available and accessible            Improved customer retention, Understanding how customers transition through each stage in their journey            Identifying communication gaps, where no or conflicting messages are being received            Identifying customer fall out points, providing opportunities to bring customers back on board</p>	

## DELIVERY CONTENT AND GUIDANCE

Ref	Knowledge	Maps to standard
K3	Apprentices will need to: Explain customer issues, including complex situations, and the reasons these need to be escalated	
K4	Business processes could include: Customer service standards Service level agreement Customer charter Mission statement Brand promise Values Customer service promise Customer service procedures Handover books/logs Training logs Team meetings	
K5	Apprentices will need to: <ul style="list-style-type: none"> <li>• Describe commercial factors</li> <li>• Describe the required customer service experience of own organisation</li> </ul>	
K6	Apprentices will need to: <ul style="list-style-type: none"> <li>• Explain their authority limits when delivering the customer experience and when escalation to others is required</li> </ul> <p>Authority limits could include:</p> <p>Issuing refunds</p> <p>Offering free gifts/services</p> <p>Amending service level agreements</p> <p>Changing the service offer</p> <p>Applying changes that affect other departments/team members</p>	

## Module 3 Knowing your customers and their needs / Customer insight

### ASSESSMENT CRITERIA

Ref	Knowledge Apprentices will need to:	Maps to standard
K1	Describe internal and external customers relevant to own role	
K2	Explain how customer behaviours require different approaches in order to fulfil organisational goals	
K3	Explain how own internal and external customer expectations can differ	
K4	Describe how to adapt own approach to meet different customer expectations, in line with organisational procedures	
K5	Explain how to analyse a range of information to provide customer insight, relevant to own organisation	
K6	Explain how to use a range of information to provide customer insight, relevant to own organisation	
K7	Explain how to present a range of information to provide customer insight, relevant to own organisation	
K8	Describe factors used to drive and improve loyalty, retention and satisfaction of customers	
K9	Describe how loyalty, retention and satisfaction of customers impact own organisation	
K10	Describe different customer types within own organisation	
K11	Explain the role of customer emotions in bringing about outcomes that benefit own customers and organisation	
K12	Explain how customer expectations can differ between cultures, ages and social profiles	

### DELIVERY CONTENT AND GUIDANCE

Ref	Knowledge	Maps to standard
K1	Apprentices will need to: Describe the difference between internal and external customers Describe who their internal and external customers are, giving examples of each	
K2	Apprentices will need to: Explain how the behaviour of their internal and external customers can differ, giving examples Explain how their own approach to different customer behaviours require different approaches	
K3	Apprentices will need to: Explain how the expectations of their internal and external customers can differ, giving examples	

## DELIVERY CONTENT AND GUIDANCE

Ref	Knowledge	Maps to standard
K4	Apprentices will need to: Describe how they would adapt their approach to meet the different customer needs and behaviours, giving examples	
K5	Apprentices will need to: Explain how to analyse different types of information to provide customer insights	
K6	Apprentices will need to: Explain how to use different types of information to provide customer insights	
K7	Apprentices will need to: Explain how to present different types of information to provide customer insights	
K8	Factors could include: Customer service provision Staff/customer relationships Meeting the customer's wants and needs Exceeding customer expectations Going the extra mile Loyalty schemes Reward schemes	
K9	Impact could include: Profitability Customer referral Positive feedback Staff retention Positive working environment	
K10	Apprentices will need to: Explain at least three different customer types within own organisation  Customer types could include: Potential customer New customer Loyal customer Impulsive customer Discount-seeking customer Customers with different wants, needs and expectations Customers with additional needs (e.g. younger, elderly, physical impairment, learning difficulty, English as a second language) Confused customer or customer needing help Dissatisfied customer	

## DELIVERY CONTENT AND GUIDANCE

Ref	Knowledge	Maps to standard
K11	<p>Apprentices will need to: Describe how the emotions of customers affects the outcomes relevant to the customers and own organisation</p> <p>Role of emotions could include: Emotional intelligence Adapting communication style and attitude Remaining calm and empathetic Being customer focused Positive language Listening skills</p> <p>Customer emotions could include: Anticipation, nervous, frustrated looking at advertising Overwhelmed, excited when researching options Excited, concerned when trialling services</p> <p>The range of emotions on the customer journey could include: Happy, Pleased, Trust, Valued, Cared for, Focused, Safe, Interested, Attentive, Energetic, Stimulated, Exploratory, Indulgent Irritated, Hurried, Neglected, Unhappy, Unsatisfied, Stressed, Disappointed, Frustrated</p>	
K12	<p>Differences could include: Communication and understanding Attitudes Elements of different cultures Language differences Religion Values and attitudes Manners and customs Education Wants, needs and expectations</p>	

## Module 4 Customer service culture and environment awareness

### ASSESSMENT CRITERIA

Ref	Knowledge Apprentices will need to:	Maps to standard
K1	Explain current legislation, compliance and regulatory guidance relevant to own role	
K2	Explain the impact of current legislation, compliance and regulatory guidance on customer service delivery within own role	
K3	Describe the position of customer service within own business environment, including culture	
K4	Explain the importance of assessing factors that influence the operation of own organisation	
K5	Describe the structure used in own organisation	
K6	Explain the role each department plays in delivering customer service, in line with organisational standards	
K7	Describe how to identify potential causes of service failure faced within own role	
K8	Explain the consequences of failure to meet customer service delivery requirements	
K9	Explain where sources of information on industry best practice can be found	
K10	Explain how industry best practice can be used to improve own personal and professional development	
K11	Assess how the sharing of own knowledge impacts own development	
K12	Assess how colleagues are impacted by sharing of own knowledge	
K13	Analyse the importance of professional image, including its relationship with the organisation's brand	

## DELIVERY CONTENT AND GUIDANCE

Ref	Knowledge	Maps to standard
K1	<p>Current legislation, regulation, guidance could include:</p> <p>The Equality Act 2010</p> <p>Consumer Rights Act 2015</p> <p>Consumer Protection Act 2017</p> <p>Consumer Protection from Unfair Trading Regulation 2008</p> <p>Food Standards Act 1999</p> <p>Food Safety Act 1990</p> <p>UK Customer Satisfaction Index (UKCSI)</p> <p>The General Data Protection Regulation 2018</p> <p>The Health and Safety (Display Screen Equipment) Regulations 1992</p> <p>The Management of Health and Safety at Work Regulations (1999) (Management Regulations)</p> <p>The Health and Safety (First Aid) Regulations and the Approved Code of Practice 1997</p> <p>The Manual Handling Operations Regulations 1992</p> <p>Standards</p> <p>British Standards Institution (BSI) / KiteMark</p> <p>European Union Standards / CE Mark</p>	
K2	<p>Apprentices will need to:</p> <p>Explain how legislation, compliance and regulatory guidance has an impact on the customer service delivery within their own role</p>	
K3	<p>Apprentices will need to:</p> <p>Explain their business environment and culture and the position of customer service within it</p> <p>Business environment could include:</p> <p>Stakeholders</p> <p>Owners</p> <p>Managers</p> <p>Workers</p> <p>Customers</p> <p>Suppliers</p> <p>Lenders</p> <p>Community</p> <p>Local environment</p> <p>Economy</p> <p>Political environment</p> <p>Business culture could include:</p> <p>How the business behaves, interacts and exists</p> <p>Core values of the business</p> <p>The 'vibe' of the business</p> <p>The attitude and behaviour of senior leaders towards staff</p> <p>The attitude of staff towards senior leaders</p> <p>Decision-making processes</p> <p>Work environment</p> <p>Work hours</p> <p>Hierarchy of the business structure</p> <p>Beliefs</p> <p>Standards</p>	

## DELIVERY CONTENT AND GUIDANCE

Ref	Knowledge	Maps to standard
K4	<p>Apprentices will need to: Describe how political, economic, social, technical, legal and environmental factors influence the operation of their organisation and the importance of assessing these factors</p> <p>Internal and external factors must include: Political factors Economic factors Social factors Technological factors Legal factors Environmental factors</p>	
K5	<p>Apprentices will need to: Describe the structure of their own organisation and the influence this has on customer service delivery</p>	
K6	<p>Apprentices will need to: Explain the different roles and functions different departments play in delivering customer service</p>	
K7	<p>Identification methods could include: Customer feedback Staff feedback Customer behaviours Changes in sales figures Increased competition Loss of customers Social media reactions</p>	
K8	<p>Consequences could include: Negative customer feedback Negative customer reviews Harm to organisation's reputation Loss of customers Loss of employees Loss of profit</p>	
K9	<p>Sources could include: Awarding organisations Regulatory bodies Government Organisations Institute of Customer Service Professional standards Professional journals Focus groups Mentors/peers Web-based research</p>	

## DELIVERY CONTENT AND GUIDANCE

Ref	Knowledge	Maps to standard
K10	<p>Uses of industry best practice could include:</p> <ul style="list-style-type: none"> <li>Learning from others</li> <li>Reduction of mistakes</li> <li>Learning from the best</li> <li>Greater recognition of learning</li> <li>Learning from others within the sector</li> <li>Learning specifically tailored to own industry/sector/organisation</li> </ul>	
K11	<p>Impacts on own development could include:</p> <ul style="list-style-type: none"> <li>Greater understanding on knowledge</li> <li>Association of knowledge learnt to different roles</li> <li>Embedding of knowledge through delivery</li> <li>Identification of missing knowledge</li> <li>Identification of misunderstood knowledge</li> </ul>	
K12	<p>Apprentices will need to:</p> <ul style="list-style-type: none"> <li>Analyse why professional image is important</li> <li>Analyse the relationship between professional image and their own organisation's brand</li> </ul> <p>Importance of professional image could include:</p> <ul style="list-style-type: none"> <li>Correct representation of self, organisation and brand</li> <li>Increased respect from colleagues and customers</li> <li>Adhering to organisational requirements</li> <li>Self-promotion of abilities, colleagues, department and organisation</li> </ul>	
K13	<p>Apprentices will need to:</p> <ul style="list-style-type: none"> <li>Explain the relationship professional image has with their organisation's brand</li> </ul>	

## Module 5 Business focused service delivery

### ASSESSMENT CRITERIA

Ref	Skill Apprentices will need to:	Maps to standard
S1	Make continuous improvements using a future focussed approach to customer service delivery within scope of own role	
S2	Analyse customer service standards of other organisations to inform own recommendations	
S3	Apply a range of approaches to resolve complex customer service issues, to support organisational objectives	6S3
S4	Demonstrate accountability for resolving complex customer service issues, in line with organisational procedures	B3
S5	Offer explanations, options and solutions that balance customer and organisational requirements	S61 6S5
S6	Communicate with customers to ensure the best solution is achieved to meet customer requirements and organisational needs	6S1
S7	Make recommendations to improve customer service based on solutions offered to customers	6S4 B4

### DELIVERY CONTENT AND GUIDANCE

Ref	Skill	Maps to standard
S1	<p>Apprentices will need to: Provide evidence of decision making and providing recommendations or advice</p> <p>Future focussed approach should include: Consideration of actions on future relationships with the customer Consideration of actions on the organisation Plans to show how recommendations can be implemented</p>	
S2	<p>Apprentices will need to:</p> <ul style="list-style-type: none"> <li>• Provide evidence of reviewing mission statements of other organisations to inform own recommendations</li> <li>• Provide a comparison of other organisations to their own organisation</li> </ul>	

## DELIVERY CONTENT AND GUIDANCE

Ref	Skill	Maps to standard
S3	<p>Complex issue: Issue that is complex and has many different parts. Fact finding for the different parts of the issue is required to arrive at a solution. Fact finding could include investigation, research and gathering feedback. The options could involve offering the customer several different choices and could include teamwork and creativity.</p> <p>Apprentices will need to:</p> <ul style="list-style-type: none"> <li>• Provide explanations of the approaches used to resolve complex issues and why</li> <li>• Provide at least two approaches to resolve complex customer service issues</li> </ul> <p>Approaches could include:</p> <p>Identify            Detecting and recognising that there is a problem, identifying the nature of the problem, defining the problem</p> <p>Structure            Observation, careful inspection, fact-finding, developing a clear picture of the problem</p> <p>Solutions            Consider a range of choices to solve problem</p> <p>Decide</p> <hr/> <p>Careful analysis of choices, selection of the best solution for implementation</p> <p>Implementation            Carry out the chosen solution</p> <hr/> <p>Monitor and seek feedback            Review approaches and outcomes, gaining feedback from relevant stakeholders</p>	
S4	<p>Apprentices will need to:</p> <p>Follow organisational procedures while being accountable for resolving complex customer service issues</p>	
S5	<p>Apprentices will need to:</p> <p>Assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements</p> <p>Apprentices will need to:</p>	
S6	<ul style="list-style-type: none"> <li>• Communication with customers to ensure they are aware of what is happening</li> <li>• Ensure that solutions meet the needs of the organisation as well as customers</li> </ul>	
S7	<p>Apprentices will need to:</p> <ul style="list-style-type: none"> <li>• Identify improvements based on solutions offered to customers to resolve complex customer service issues</li> <li>• Make recommendations based on the improvements identified</li> </ul>	

## Module 6 Providing a positive customer experience

### ASSESSMENT CRITERIA

Ref	Skill Apprentices will need to:	Maps to standard
S1	Use advanced communication skills to negotiate mutually beneficial outcomes	
S2	Deliver on agreed outcomes in line with organisational policies and procedures	
S3	Manage challenging and complicated situations within scope of own level of authority	
S4	Use lessons learnt to make recommendations to enable and deliver change to service or strategy, to enhance organisational service	5S7
S5	Support customers make choices and agree next steps through use of clear explanations	5S5
S6	Interpret the customer experience to achieve results in line with organisational customer satisfaction requirements	
S7	Work in a cost effective way when meeting customer and business needs	
S8	Adhere to the service level agreement of own organisation	
S9	Identify where highs and lows of own customer's journey produce a range of emotions in the customer	
S10	Recognise when customer emotions have been affected by the level of service offered	
S11	React to customer emotions to achieve successful outcomes for different customer types	
S12	Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format	
S13	Adapt communication methods to simplify complex information in a way that supports positive customer outcomes	

### DELIVERY CONTENT AND GUIDANCE

Ref	Skill	Maps to standard
S1	<p>Apprentices will need to:</p> <ul style="list-style-type: none"> <li>• Demonstrate identifying, negotiating and agreeing appropriate options with customers, making realistic commitments</li> <li>• Include advanced questioning, listening and summarising skills</li> </ul> <p>Advanced questioning, listening and summarising skills could include:</p> <p>Closed questions</p> <p>Open questions</p> <p>Leading questions</p> <p>Recall and process questions</p> <p>Funnelling</p> <p>Active listening</p> <p>Reflecting and clarifying</p> <p>Positive body language</p>	

## DELIVERY CONTENT AND GUIDANCE

Ref	Skill	Maps to standard
S2	Apprentices will need to: Evidence that they have agreed outcomes with customers, delivered on the agreements, while following organisational policies and procedures	
S3	Apprentices will need to: Demonstrate management of challenging and complicated situations, balancing organisational needs and customer satisfaction  Challenging and complicated situations could include: Special/unusual requests Requests out of role authority Ongoing issues Complex problems/issues Angry customers Accidents/emergencies Security issues Customers with additional needs (e.g. younger, elderly, physical impairment, learning difficulty, English as a second language)	
S4	Recommendations for change could include: Improved customer service promise e.g. timeliness of answering phone calls, meeting customer's expectations, responding to their needs Changes in procedures Changes in customer service provision e.g. more staff at busy times Staff training	
S5	Apprentices will need to: <ul style="list-style-type: none"> <li>• provide options and solutions to support customer choice</li> <li>• Support must include influencing and helping customers</li> </ul>	
S6	Apprentices will need to: Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction	
S7	Apprentices will need to: Demonstrate a cost-conscious mind-set when meeting customer and the business needs  Cost-conscious mind-set could include: Balancing needs of customer with the profits of the organisation	
S8	Service level agreement might include: Service to be provided, desired performance outputs, monitoring and reporting processes and issue response timings.	
S9	The range of emotions on the customer journey could include: Anticipation, nervous, frustrated looking at advertising, Overwhelmed, excited when researching options, Excited, concerned when trialling services, Happy, pleased, Trust, valued, cared for, focused, safe, Interested, attentive, energetic, Stimulated, exploratory, indulgent, Irritated, hurried, neglected Unhappy, unsatisfied, stressed, disappointed, frustrated	

## DELIVERY CONTENT AND GUIDANCE

Ref	Skill	Maps to standard
S10	Recognising situations affection customer emotions could include: Customer feedback Customer interactions Lack of customer feedback Changes in customer behaviour Verbal questioning Social media reviews Changes in customer interactions Changes in customer habits	
S11	Reacting to customer emotions could include: Adapting communication style Providing additional information Escalating or passing customers to colleagues Remaining professional Being sympathetic to customer needs	
S12	Apprentices will need to: <ul style="list-style-type: none"><li>• Use written and verbal communication to communicate information</li><li>• Simplify information to provide positive customer outcomes</li></ul>	
S13	Apprentices will need to: <ul style="list-style-type: none"><li>• Adapt written and verbal communication methods to meet the needs of customers</li><li>• Communicate complex information clearly and concisely</li></ul>	

## Module 7 Working with your customers / Customer insight

### ASSESSMENT CRITERIA

Ref	Skill Apprentices will need to:	Maps to standard
S1	Proactively gather customer feedback, using a variety of methods	9S1
S2	Critically analyse the meaning, implication and facts from customer feedback and make recommendations	
S3	Use recommendations to change the customer service level agreement, in order to improve service	
S4	Evaluate the strengths and weaknesses of feedback methods used in own organisation	
S5	Recommend alternative methods to gather customer feedback likely to improve results	
S6	Analyse own customer types to anticipate their needs and expectations when providing service	
S7	Demonstrate how knowledge of customers and their needs has a direct impact on own working practices	
S8	Demonstrate how knowing their customers and their needs has a direct impact on organisational policies and procedures	

### DELIVERY CONTENT AND GUIDANCE

Ref	Skill	Maps to standard
S1	<p>Apprentices will need to:</p> <ul style="list-style-type: none"> <li>• Provide evidence to show how they identify information which can be used by their organisation to provide customer insight, using input from others, where required</li> <li>• Evidence how they proactively seek and gather customer feedback through three methods</li> </ul> <p>Feedback methods could include:            Customer feedback records/logs            Customer focus groups            Face-to-face feedback            Customer Emails/letters            Social media reviews/records</p>	
S2	<p>Apprentices will need to:</p> <ul style="list-style-type: none"> <li>• Identify how information can be analysed, used and presented</li> <li>• Evaluate the feedback to make recommendations on possible improvements</li> <li>• Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers</li> </ul> <p>Analysis could include:            Qualitative research such as focus groups, in-depth interviews and observations            Quantitative research methods such as collecting customer data</p>	

## DELIVERY CONTENT AND GUIDANCE

Ref	Skill	Maps to standard
S3	Apprentices will need to: Make improvements to customer service level agreements from recommendations based on customer feedback previously analysed	
S4	Strengths and weaknesses of feedback could include: Unbiased / biased feedback Selective feedback Limited feedback detail Feedback limited to specific customer type/s Fully encompassing feedback Enhanced feedback detail Feedback from all customer types Time taken to interpret feedback Ability to interpret feedback Ability to analyse feedback	
S5	Apprentices will need to: Recommend alternative customer feedback methods, stating reasons for choice that will improve results	
S6	Apprentices will need 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  Different customer types could include: Internal and external customers Work colleagues Potential customer New customer Loyal customer Impulsive customer Discount-seeking customer Customers with different wants, needs and expectations Customers with additional needs (e.g. younger, elderly, physical impairment, learning difficulty, English as a second language) Confused customer Customer needing help Angry customer	
S7	Impact could include: Improvements to working practices Identification of learning needs Ability to support others Ability to address customer needs	
S8	Impact could include: Identifying amendments needed to policies and procedures Changes to policies and procedures Knowing which policies and procedures are relevant at which times	

## Module 8 Customer service performance

### ASSESSMENT CRITERIA

Ref	Skill	Maps to standard
	Apprentices will need to:	
S1	Recognise when customer expectations are not met	
S2	Use communication techniques to maintain positive relationships with customers when customer expectations are not met	
S3	Demonstrate the importance of effective communication between departments in providing good customer service	B6
S4	Determine next steps when managing referrals or escalations, in line with organisational procedures	

### DELIVERY CONTENT AND GUIDANCE

Ref	Skill	Maps to standard
S1	Apprentices will need to: Evidence when they recognise that customer expectations have not been met	
S2	Apprentices will need to: <ul style="list-style-type: none"> <li>• Evidence when they have maintained a positive relationship even when they are unable to deliver the customer's expected outcome</li> <li>• Use communication techniques to maintain positive relationships with customers</li> </ul>	
S3	Apprentices will need to: <ul style="list-style-type: none"> <li>• Evidence that they understand the importance of effective communication between departments</li> <li>• Communicate effectively between different departments to provide good customer service</li> </ul>	
S4	Apprentices will need to: Demonstrate they have taken into account historical interactions, challenges and related information in determining the next steps, when managing referrals and escalations	

## Module 9 Service improvement

### ASSESSMENT CRITERIA

Ref	Skill Apprentices will need to:	Maps to standard
S1	Communicate with customers to gain full information on their experience	
S2	Analyse the end to end service experience of own customers	
S3	Make recommendations based on findings of analysis of end to end service experience to enable improvement	
S4	Identify the steps required to implement change recommended from analysis of end to end service experience	
S5	Identify the benefits of change recommended from analysis of end to end service experience on the organisation and own role	
S6	Recognise when issues reoccur in the context of own role	
S7	Analyse the reasons for issues reoccurring	
S8	Recommend appropriate changes to resolve reoccurring issues with others	
S9	Record possible ways of addressing reoccurring issues to ensure they do not reoccur	
S10	Analyse the risks and opportunities of implementing change in own organisation	
S11	Take into consideration current legislation, compliance and regulatory guidance when making recommendations and implementing change	
S12	Evaluate improvements made to own customer service to ensure a future-focused approach	

### DELIVERY CONTENT AND GUIDANCE

Ref	Skill	Maps to standard
S1	<p>Communication could include: Verbal, written, face to face, remote/distance</p> <p>Experience must relate to the customer service experience received by their own organisation</p>	
S2	<p>Apprentices will need to: Evidence the way in which they analyse the data to recommend continuous improvement, showing when there is input from others where required, supporting development of solutions</p>	
S3	<p>Apprentices will need to: Recommend improvements to the customer service provision based on the analyses of the end to end customer service experience</p>	

## DELIVERY CONTENT AND GUIDANCE

Ref	Skill	Maps to standard
S4	<p>Apprentices will need to: Identify the steps needed to implement recommended change</p> <p>Recommended change must be based on the end to end customer service experience</p>	
S5	<p>Apprentices will need to: Identify the benefits of the recommended change</p> <p>Recommended change must be based on the end to end customer service experience</p>	
S6	<p>Reoccurring issues must also include reoccurring problems</p> <p>Apprentices will need to: Identify and recognise when problems/issues reoccur and discuss these reoccurring problems with others</p>	
S7	<p>Apprentices will need to:</p> <ul style="list-style-type: none"> <li>Analyse the different reasons that issues and problems reoccur within own service delivery</li> <li>Identify trends in reoccurring problems/issues</li> </ul>	
S8	<p>Apprentices will need to: Make recommendations to change the service delivery to resolve reoccurring issues and problems</p>	
S9	<p>Apprentices will need to: Identify and record possible methods of addressing reoccurring issues and problems to ensure they do not reoccur</p>	
S10	<p>Apprentices will need to: Identify potential changes within the organisation and analyse the opportunities and risks associated with implementing these changes</p> <p>Risks and Opportunities could include: Expanding customer base Increased profit Reduced complaints/issues Loss of customers Reduction in profits Exclusion of existing customers</p>	

## DELIVERY CONTENT AND GUIDANCE

Ref	Skill	Maps to standard
S11	<p>Current legislation, regulation, guidance could include:</p> <ul style="list-style-type: none"><li>The Equality Act 2010</li><li>Consumer Rights Act 2015</li><li>Consumer Protection Act 2017</li><li>Consumer Protection from Unfair Trading Regulation 2008</li><li>Food Standards Act 1999</li><li>Food Safety Act 1990</li><li>UK Customer Satisfaction Index (UKCSI)</li><li>The General Data Protection Regulation 2018</li><li>The Health and Safety (Display Screen Equipment) Regulations 1992</li><li>The Management of Health and Safety at Work Regulations (1999) (Management Regulations)</li><li>The Health and Safety (First Aid) Regulations and the Approved Code of Practice 1997</li><li>The Manual Handling Operations Regulations 1992</li></ul>	
S12	<p>Apprentices will need to:</p> <p>Evaluation improvements made to customer service, identifying positive and negative outcomes, identifying enhancements to future improvement processes for the future</p>	

## Module 10 Behaviours

The mapping for behaviours is for guidance and an example of the most likely modules in which the behaviour will be demonstrated.

Behaviours can be assessed in any module.

Module	Ref	Behaviour Apprentices will need to:	Mapping
Develop self	B1	Proactively keep their service, industry and best practice knowledge and skills up-to-date	
	B2	Achieve agreed goals within personal development plan, in relation to their knowledge and skills of customer service	
Ownership/ responsibility	B3	Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and the organisation	5S4
	B4	Exercise proactivity and creativity when identifying solutions to customer and organisational issues	5S7, 6S4
	B5	Make realistic promises and deliver on them	6S2
Team working	B6	Work effectively and collaboratively with colleagues at all levels to achieve results	8S3
	B7	Recognise colleagues as internal customers	
	B8	Show adaptability of own skills when working with internal customers	
	B9	Share knowledge and experience with others to support colleague development	
Equality	B10	Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer	
	B11	Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment	
	B12	Support equality, diversity and inclusion in own customer service delivery	
Presentation	B13	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction	
	B14	Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand	

## End-point Assessment Coverage

Each End-point Assessment will cover specific criteria of the modules within the standard. This coverage is as follows. The coverage (example – 1K1 – 1K5) is taken from the amplification above.

### Practical observation with question and answers

The practical observation will cover the following elements of the standard:

MODULE	COVERAGE
Knowing your customers and their needs/ Customer insight	K5 – K7, K10 – K12
Customer service culture and environmental awareness	K1 – K2
Business focus service delivery	S3 – S7
Providing a positive customer experience	S1 – S5, S9 – S13
Customer service performance	S1 – S2, S4
Behaviours	B3 – B4, B6 – B8, B10 – B14

### Work based project, supported by an interview

The work-based project will cover the following elements of the standard:

MODULE	COVERAGE
Business knowledge	K1, K3 – K7
Customer journey knowledge	K1 – K2, K4
Customer service culture and environmental awareness	K3 – K8
Business focus service delivery	S1 – S2
Providing a positive customer experience	S6
Working with your customers/ Customer insight	S1 – S8
Customer service performance	S3
Service improvement	S1 – S11

## Professional discussion supported by portfolio evidence

The professional discussion will cover the following elements of the standard:

MODULE	COVERAGE
Business knowledge	K2, K8 – K9
Customer journey knowledge	K3, K5 – K6
Knowing your customers and their needs/ Customer insight	K1 – K4, K8 – K9
Customer service culture and environmental awareness	K9 – K13
Providing a positive customer experience	S7 – S8
Service improvement	S12
Behaviours	B1 – B2, B5, B9

## Re-Assessment

To be confirmed.

## Assessment Overview

The End-point Assessor will review the evidence for each apprentice and grade the apprentice on the following scale: Fail/Pass/Distinction. The End-point Assessor will make the final decision as to whether the standard has been met or not.

All apprentices must take all elements of the End-point Assessment and achieve a minimum of a pass for each component.

ASSESSMENT METHOD	AREA ASSESSED	ASSESSED BY	WEIGHTING
Practical observation with question and answers	Knowing your customers and their needs/customer insight, Customer service culture and environmental awareness, Business focus service delivery, Providing a positive customer experience, Customer service performance, Behaviours	End-point Assessor	N/A
Work-based project supported by an interview	Business knowledge, Customer journey knowledge, Customer service culture and environmental awareness, Business focus service delivery, Providing a positive customer experience, Working with your customers/customer insight, Customer service performance, Service improvement	End-point Assessor	N/A

ASSESSMENT METHOD	AREA ASSESSED	ASSESSED BY	WEIGHTING
Professional discussion supported by portfolio evidence	Business knowledge, Customer journey knowledge, Knowing your customers and their needs/customer insight, Customer service culture and environmental awareness, Providing a positive customer experience, Service improvement, Behaviours	End-point Assessor	N/A

If the apprentice receives anything less than 100% of the pass criteria for any one of the assessment methods, the overall grade will be Fail.

## Grading

The marks will be combined to provide an overall grade. The grade is allocated on the following marks being achieved:

GRADE	REQUIREMENTS
Pass	All pass criteria achieved
	Practical observation with question and answers 34
	Work-based project supported by an interview 25
	Professional discussion supported by portfolio evidence 20
Distinction	All pass criteria achieved and all distinction criteria
	Practical observation with question and answers 2
	Work-based project supported by an interview 13
	Professional discussion supported by portfolio evidence 4

A final grade result is provided following overall review of apprentice performance across the three assessment methods.

The final grade will not be awarded until after moderation of the End-point Assessors decision has been completed by Innovate Awarding.

## Internal Quality Assurance

Internal quality assurance is conducted by Innovate Awarding. All assessments completed by an apprentice are subject to Innovate Awarding's Internal Quality Assurance Policies.

## External Quality Assurance

The external quality assurance organisation for the Customer service practitioner standard is Ofqual. The external quality assurance organisation may require access to an apprentice's assessments and they may require to speak to the apprentice directly. Innovate Awarding has a responsibility to accommodate any reasonable request made by the external quality assurance organisation.

## Further Information

[www.innovateawarding.org/apprenticeshipstandards](http://www.innovateawarding.org/apprenticeshipstandards)

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Version 6 | April 2021