



Specification

Level 3 Customer Service Specialist v1.1

Contents

Innovate Awarding	3
The Apprentice Standard and Assessment Plan	4
The Apprentice	5
Off-the-Job Training	5-6
Gateway	6-9
End-Point Assessment	9-11
Grading	11
Annex 1 – Assessment Plan and Occupational Standard	13
Annex 2 – Additional Information	14

Innovate Awarding

Meet our Managing Director

Welcome to the Level 3 Customer Service Specialist Apprenticeship. Our Innovate Awarding EPA Journeys are designed to ensure the employer, provider, assessor and apprentice have the appropriate support and guidance to allow successful completion of an apprenticeship, providing further confidence and assurance having chosen us as an End-Point Assessment Organisation.

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/>

Our EPA Journeys

We have created four bespoke EPA Journeys tailored to the individual needs of the employer, provider, assessor and apprentice to enable a cross functional approach to EPA.

The Level 3 Customer Service Specialist EPA Journeys are available to download on EPAPro.

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:

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

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.

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 / Institute for Apprenticeships and Technical Education](#)

Level 3 Customer Service Specialist ST0071 Version 1.1

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
V2	1 Nov 2024	Off-the-job training	Pages 5 and 6
		Bookings	Page 7

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



Innovate Awarding
Block F, 291 Paintworks, Arnos Vale,
Bristol, BS43AW

 innovateawarding.org

 contactus@innovateawarding.org

 +44 (0)117 314 2800