

Standard Assessment Specification Level 2 Customer Service Practitioner



Change control

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

Version number	Date uploaded	Overall grade	Page affected
10		Amendments made to reflect that a maximum timeframe has been added for the observation assessment	7 & 28

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 Apprentice Assessment Organisation (AAO) 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.

Apprenticeship overview

The role of a customer service practitioner is to deliver high quality products and services to the customers of their organisation. Your core responsibility will be to provide a high-quality service to customers which will be delivered from the workplace, digitally, or through going out into the customer's own locality. These may be one-off or routine contacts and include dealing with orders, payments, offering advice, guidance and support, meet-and-greet, sales, fixing problems, after care, service recovery or gaining insight through measuring customer satisfaction.

Standard Name	Customer Service Practitioner
Level	2
Sector	Customer Service
Programme duration	12 - 15 months
Minimum time on programme	12 months
EPA Duration	2 months
EPA Methods	<ul style="list-style-type: none"> • Apprentice showcase • Practical observation • Professional discussion
Outcomes	Fail, Pass, Distinction
External Quality Assuring Centre	Ofqual

Who is the apprenticeship for?

This apprenticeship is for individuals working in a customer service role. Apprentices may work in different customer service environments as long as they interact with customers as the main part of their job role. Interaction may be face to face or distance using different sources of communication media. Apprentices will need to be able to deal with challenges and conflicts from customers and work as part of a team.

Role of Innovate Awarding

Innovate Awarding is the End-point Assessment organisation which 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
- Practice papers
- Full mock papers
- Exemplar assessments
- 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 provider.

Gateway

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

- achieve Functional Skills for Maths and English at level 1 and attempt these at level 2

The employer and training provider/employer provider must confirm that the apprentice is ready to complete the End-point Assessment before they can pass through to the gateway. This will be completed at the gateway meeting and documented on EPA Pro. This notifies Innovate Awarding that the apprentice is ready for their End-point Assessment and the End-point Assessment planning meeting needs to be organised.

Before the apprentice enters the gateway, they should be comfortable with the assessments they will complete and ready to demonstrate they can achieve the standard of the apprenticeship.

Module Overview

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

Modules	Assessment Methods		
	Apprentice Showcase	Practical Observation	Professional Discussion
Knowing your customers			✓
Understanding the organisation	✓		
Meeting regulations and legislation	✓		
Systems and resources	✓		
Your role and responsibilities			✓
Customer experience			✓
Product and service knowledge	✓		
Interpersonal skills		✓	
Communication		✓	
Influencing skills	✓		
Personal organisation	✓	✓	
Dealing with customer conflict and challenge	✓		
Developing self	✓		
Being open to feedback	✓		
Team working	✓		
Equality – treating all customers as individuals		✓	
Presentation – dress code, professional language		✓	
Right first time		either one ✓ not both	



End-point Assessment

The End-point Assessment requires the apprentice to demonstrate that they have achieved the 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 is the apprenticeship showcase?

A body of work completed during the apprenticeship either electronically or paper-based which might include contributions to documents, direct observation, performance development plans or reflective accounts completed by the apprentice demonstrating their learning and application of knowledge in practice, their values and behaviours. The apprentice should select appropriate evidence from their portfolio, with support from the employer and training provider/employer provider, to show the best of their ability. The apprentice will then present this evidence to the End-point Assessor and this will allow the apprentice to answer questions to show a deeper understanding of the standard.

The expectation is that the apprentice will present, through formal (using presentation software) or informal methods, to the EPA and they will show the best of their on programme evidence. The apprentice can produce a report that covers the knowledge, skills and behaviours and this report should also include work product evidence. In the case that the apprentice decides to produce a report, this will need to be provided to the End-point Assessor at least 7 working days prior to the apprentice showcase assessment date.

To meet the needs of the apprentice and the employer, the Apprenticeship showcase will be assessed by the End-point Assessor remotely unless an alternative method is required by the apprentice.

What is the practical observation?

The practical observation will be pre-planned and scheduled for when the apprentice will be in their normal place of work and will be carried out by the End-point Assessor. The observation should enable the apprentice to evidence their skills, knowledge and behaviours from across the standard to demonstrate genuine and demanding work objectives. The practical observation cannot be simulated or staged. The practical observation must last for a minimum of 1 hour and a maximum of 2 hours.

Each situation within the observation will be different, and examples are, handling a general enquiry, dealing with a customer complaint or a need for further information or detail, but it is mandatory that the observation covers as a minimum: presentation, equality, interpersonal skills, communication and personal organisation.

Those areas of the standard which are not able to be evidenced during the observation will be discussed subsequently as part of the professional discussion with the End-point Assessor. Therefore, the practical observation must be completed before the professional discussion.

What is the professional discussion?

The professional discussion will be a structured discussion between the apprentice and the End-point Assessor, following the observation, to establish the apprentice's understanding and application of knowledge, skills and behaviours. The professional discussion will need to take place in a suitable environment and should last for a maximum of one hour. The discussion will be against set criteria (listed below) to ensure standardisation and consistency. It will be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence.

The purpose of the professional discussion is to:

- Clarify any questions the End-point Assessor has from their assessment of the learner journey and practical observation
- Confirm and validate judgements about the quality of work
- Explore aspects of the work, including how it was carried out, in more detail
- Discuss how the apprentice would behave in specific scenarios, should they not have occurred within the practical observation
- Ask questions in relation to personal development and reflection
- Provide a basis for the End-point Assessor to make a decision about the grade to be awarded.



Apprenticeship Standard Amplification

Module 1 Knowing your customers

Know different types of customers, their needs and expectations and recognising when to adapt customer approach

Ref	Knowledge	Maps to standard
K1	Apprentices will need to: Describe different customer groups within own role and organisation	
DC K2	Explain the importance to the organisation of building customer relationships	
K3	Compare the needs of internal and external customers of an organisation	
DC K4	Explain the different ways internal and external customer relationships are managed	
K5	Describe the needs and priorities of own customers	
K6	Explain how to adapt the approach to customer service to meet the needs and expectations of customers	
DC K7	Explain the importance of balancing the needs of the organisation and customers	
Delivery content		
Ref	Knowledge	Maps to standard
K1	Customers could include: potential customers, loyal customers, new customers, discount customers, impulsive customers	
DC K2	Importance could include: return custom, good reputation, customer loyalty, meeting organisational requirements	
K3	Apprentices will need to: <ul style="list-style-type: none"> Identify the difference between internal and external customers Explain the internal and external customers of the organisation and the differences between them 	
DC K4	Relationship management could include: communication, advice, information, authority, delegation, involvement, decision making	
K5	Apprentices must include customer who's needs are protected under current equality law Needs and priorities could include: price, quality, timeframe, product features, product benefits, location of organisation, reputation of organisation	
K6	Adaption could include: busy/quiet period, customer demands, availability of resources, communication style	
DC K7	Considerations include: benefits to the organisation, drawbacks to the organisation if not achieved, long term ability to trade, achieving operational targets	

DC refers to distinction criteria

Module 2 Understanding the organisation

Know the purpose and brand promise of the organisation, its values and the policies and procedures to adhere to

Ref	Knowledge	Maps to standard
K1	Apprentices will need to: State the aims of own organisation in relation to their sector	
K2	Describe own organisation's brand promise	
K3	Describe own organisation's core values, including how they link to the service culture	
K4	State own organisation's internal policies and procedures	
K5	Describe how a digital media policy affects the use of social and digital media in the work environment	
DC K6	Explain how the organisational policies and procedures impact the delivery of customer service	
Delivery content		
Ref	Knowledge	Maps to standard
K1	Identify the organisations aims and purpose while relating this to the sector the organisation operates in	
K2	Brand Promise: define and relate to their organisation	
K3	Core values: define core values, identify the organisations core values, define service culture, relate core values to service culture of the organisation	
K4	Apprentice must include any complaints processes and digital media policies that are relevant to them and own organisation Policies and procedures could include: Staff recruitment, conflict resolution processes, employees' code of conduct, internal and external influences, confidentiality, digital media, safety and security, ethics and bespoke policies and procedures relating to customer service.	
K5	Apprentice will need to: Describe what is covered by a digital media policy and how this affects the use of digital and social media within own organisation Digital media: audio, video, photo content, social media. Understand the guidelines that apply specifically to the use of social media in a digital media policy and how this applies in their organisation	
DC K6	Apprentice will need to: Describe the impact organisational policies and procedures have on their job role. This may include: response timeframes, authority levels, complaint handling, service offer, style of communication and interaction, limiting factors, enhancements to customer service, time constraints, internal and external influences, additional/reduced costs	

DC refers to distinction criteria



Module 3 Meeting regulations and legislation

Know legislation and regulatory requirements affecting the organisation and the individual responsibilities related to them

Ref	Knowledge	Maps to standard
K1	Apprentices will need to: Explain legislation and regulatory requirements and the affect they have on the service provision in own organisation	
K2	State own responsibility for applying legislation and regulatory requirements	
DC K3	Explain the potential impact on the organisation if it fails to adhere to legislation and regulation requirements	
DC K4	Explain how a code of practice or ethical standards affects customer service	

Delivery content

Ref	Knowledge	Maps to standard
K1	Current legislation and regulations could include: Consumer Rights Act 2015, Consumer Credit Act 2006, Misrepresentation Act 1967, Maintaining confidentiality: Data Protection Act 1998	
K2	Apprentices need to state what their own responsibilities are for applying legislation and regulatory requirements, from an organisational perspective and a legal perspective	
DC K3	Apprentices need to include: keeping information confidential and employees/employer’s responsibilities under health and safety at work act Responses need to explain a range of potential impacts across a range of legislations and regulations for the organisation	
DC K4	Code of Practice/ethical standards: define their organisations code of practice or ethical standard and relate to the potential benefits and drawbacks to customer service	

DC refers to distinction criteria

Module 4 Systems and resources

Know how to deliver customer service through systems, equipment and technology and how to measure and evaluate customer service

Ref	Knowledge	Maps to standard
K1	Apprentices will need to: Explain how to use systems, equipment and technology to meet the needs of your customers	
K2	Describe types of measurement and evaluation tools available to monitor customer service levels	
Delivery content		
Ref	Knowledge	Maps to standard
K1	Systems could include: Policies and procedures that promote good customer service such as appraisal systems, competency frameworks, objectives and SMART targets, evaluation systems that document and action feedback, 360-degree feedback. Equipment could include: Computerised packages that capture sales data, monitoring of sales, refunds, forecasts, evaluation, surveillance equipment, data bases with customer information, CRM. Technology could include: Marketing tools to advertise customer requests, telephone databases, audio software, self-service technology, online feedback/reviews	
K2	Tools could include: Customer service satisfaction survey, customer satisfaction score, average resolution rate, mystery customers, complaints or compliment letters/feedback, staff turnover, number of new customers, turnover, Customer Relationship Management systems, appraisal systems, meetings	

DC refers to distinction criteria



Module 5 Your role and responsibilities

Know their role, responsibilities, targets and goals and the impact they have on others within the organisation

Ref	Knowledge	Maps to standard
K1	Apprentices will need to: Explain own role and responsibilities within the organisation	
K2	Describe the impact of own actions on others	
K3	Describe how to achieve own targets and goals	
Delivery content		
Ref	Knowledge	Maps to standard
K1	Roles and responsibilities could include: working towards common goals, following good practice, informed decision making, sharing best practice, sharing feedback, being proactive, team work	
K2	Positive impact could include: better trained colleagues, achieving organisation requirements, better customer service, high staff retention, higher customer service reviews/feedback, better mystery shopper reports. Negative impact could include: Dismissal, grievance, accidents, breach of legislation, customer complaints, and bad organisational reputation	
K3	Actions to support agreed targets and goals include: meetings, appraisals, one-to-ones, support sessions, SMART goals, clear communication, proactive approach, team work, supporting colleagues, asking for assistance, mentoring, guidance, feedback, disciplinary and grievance procedures, training and development, self-responsibility, work shadowing	

DC refers to distinction criteria

Module 6 Customer experience

Know how to build trust and create a customer focused experience

Ref	Knowledge	Maps to standard
K1	Apprentices will need to: Describe how to establish the facts when dealing with customers	
K2	Explain how an understanding of the facts can be used to create a customer focused experience	
K3	Explain how to build trust with a customer and the importance of doing so	
DC K4	Explain how to respond to customer needs and requirements positively	
Delivery content		
Ref	Knowledge	Maps to standard
K1	Apprentices must include why creating a customer-focused experience is important Apprentices could include: asking questions, listening to customers, interpreting behaviours and mannerisms	
K2	Establishing facts: how does an understanding of customers, their desires, situations and requirements create a bespoke customer focused experience	
K3	How to build trust includes: Listening, asking questions, being attentive, going the extra mile, being knowledgeable, interpersonal skills. Importance of building trust includes: Increasing customer loyalty, new business through positive word-of-mouth, achieving organisational objectives, increasing organisational reputation	
DC K4	Responses could include: Positive body language, interpersonal skills, providing information, going the extra mile	

DC refers to distinction criteria

**Module 7 Product and service knowledge**

Know the products and/or services offered by the organisation

Ref	Knowledge	Maps to standard
K1	Apprentices will need to: Describe the features and benefits of the products and/or services within own organisation	
K2	Describe how to maintain product and/or service knowledge within own organisation	
DC K3	Explain the importance of updating knowledge of organisation products and/or services	
Delivery content		
Ref	Knowledge	Maps to standard
K1	Feature: factual function of the product or service Benefit: the result of the feature that provides a convenience to the customer	
K2	Methods for maintaining knowledge could include: training sessions, using products, shadowing others, online courses, product descriptions	
DC K3	Importance could include: provide correct information, reduced mistakes, increased reputation, minimise loss of custom, increase return custom	

DC refers to distinction criteria

Module 8 Interpersonal skills

Know interpersonal skills and how to build rapport with customers

Ref	Skill	Maps to standard
S1	Apprentices will need to: Build rapport and determine customer expectations using interpersonal skills	
DC S2	Adapt interpersonal skills to meet the needs of different customers, adhering to the Equality Act	
S3	Achieve positive engagement and delivery through interpersonal skills	
DC S4	Balance the needs and expectations of customers with those of the organisation	
S5	Work with and share ideas with colleagues and others	15B1, 15B3
DC S6	Proactively work with others to deliver efficient customer service	15B1

Delivery content

Ref	Skill	Maps to standard
S1	Rapport: a close relationship with others where thoughts, feelings and ideas are understood, and good communication occurs Interpersonal skills include: Communication, emotional intelligence, team working, negotiation, persuading and influencing skills, problem solving and conflict resolution Evidence examples could include questioning techniques and discussions, working as part of a team to achieve objectives or cross-department working. Documents related to activity, meeting notes, feedback, satisfaction surveys and evaluation forms	
DC S2	Evidence examples could include questioning techniques and discussions, working as part of a team to achieve objectives or cross-department working. Documents related to activity, meeting notes, feedback, satisfaction surveys and evaluation forms. Apprentices must show that they have adhered to the Equality Act while adapting interpersonal skills. This could involve using suitable language to meet individual needs, adapting approach to adjust for a person with a disability. This may include: the use of visual aids, adapting your speak and body language for a customer with a hearing disability, increased verbal descriptions of products and/or services, contract agreements and pricing information for a customer with a vision impairment	
S3	Evidence examples could include questioning techniques and discussions, working as part of a team to achieve objectives or cross-department working. Documents related to activity, meeting notes, feedback, satisfaction surveys and evaluation forms.	
DC S4	Evidence examples could include questioning techniques and discussions, working as part of a team to achieve objectives or cross-department working. Documents related to activity, meeting notes, feedback, satisfaction surveys and evaluation forms. Evidence examples must show that the needs of the customer and organisation have been achieved	
S5	Evidence examples could include questioning techniques and discussions, working as part of a team to achieve objectives or cross-department working. Documents related to activity, meeting notes, feedback, satisfaction surveys and evaluation forms	
DC S6	Evidence examples could include questioning techniques and discussions, working as part of a team to achieve objectives or cross-department working. Documents related to activity, meeting notes, feedback, satisfaction surveys and evaluation forms	



Module 9 Communication

Know verbal and non-verbal communication techniques to confirm customer expectations

Ref	Skill	Maps to standard
S1	Apprentices will need to: Use appropriate communication skills to make initial contact with customers	
S2	Adapt communication skills to recognise and confirm understanding of customer needs	
S3	Use summarising language during communications	
S4	Exhibit the correct tone in all communications	
DC S5	Apply the Equality Act to all communications, adapting own techniques to suit the customer or interaction	
Dc S6	Adapt to customer personalities while remaining professional and following organisational procedures for communications in line with organisation's brand	

Delivery content

Ref	Skill	Maps to standard
S1	Apprentices must show they can make initial communications during face to face and/or non-face to face interactions with customers	
S2	Apprentices must include tone, behaviour and body language (face-to-face communication only) and reinforcement techniques (non-face-to-face only) to confirm understanding as appropriate	
S3	Apprentices must show they can summarise communications with customers. Summarising could include: conveying the main points/outcomes, agreeing actions to be taken, concise review of the discussion	
S4	Apprentices must include as appropriate verbal (face-to-face communication only) or written and digital communication (non-face-to-face only) that reflect the organisation's requirements	
DC S5	Apprentices must show they comply with the Equality Act during communications	
DC S6	Apprentice must show they can be flexible in their approach to different customer personalities while remaining calm and in control, while following organisational procedures for communication and brand/organisation requirements	

DC refers to distinction criteria

Module 10 Influencing skills

Know how to provide information to customers to reach mutually beneficial outcomes

Ref	Skill	Maps to standard
S1	Apprentices will need to: Offer appropriate products and/or service options to customers to meet customer and organisation needs	12S3
S2	Communicate the reasons why offered products and/or service options meet the needs of the customers	12S3
S3	Handle customer objections in a positive and professional manner	12S1
DC S4	Explain to customers why desired outcomes cannot be achieved	

Delivery content

Ref	Skill	Maps to standard
S1	Apprentices will need to understand the services and/or products provided by their organisation and offer these to customers appropriately	
S2	Apprentices will need to communicate to customers the reasons for offering the products/services and why they meet their needs	
S3	Apprentices will need to deal with objections in a positive and professional manner, ensuring a positive outcome is achieved for the customer. This could include miscommunication, a difference between expected and actual product/service, difference in price	
DC S4	Apprentices will need to ensure that customers are aware of the reasons why their expected outcome cannot be achieved. This could include being able to offer a refund, replacement of the product/service, change in product/service offer, withdraw of promotional offer.	

DC refers to distinction criteria

**Module 11 Personal organisation**

Know how to organise and priorities work to meet deadlines

Ref	Skill	Maps to standard
S1	Apprentices will need to: Plan and prioritise tasks according to agreed deadlines	
S2	Use appropriate tools and techniques to monitor progress of tasks	
DC S3	Respond professionally to challenges and changes and adjust priorities accordingly	
Delivery content		
Ref	Skill	Maps to standard
S1	Planning and priority methods could include: to do lists, task lists, reminders, activity planners, workload reviews, realistic deadline setting	
S2	Tools and techniques could include: work sheets, progress trackers, workload reviews, catch up meetings	
DC S3	Apprentices will need to demonstrate that they can handle challenges and changes to their workload and adjust task priorities as needed.	

DC refers to distinction criteria

Module 12 Dealing with customer conflict and challenge

Know how to remain professional during challenging situations while meeting customer expectations

Ref	Skill	Maps to standard
S1	Apprentices will need to: Remain professional when dealing with challenging customer situations	18B2
S2	Show empathy when dealing with customers	10S3
S3	Communicate customer options in a way that achieves their expectations	10S1
S4	Resolve conflict and/or challenges in line with organisational policies and procedures	10S3
S5	Keep customers informed of progress while resolving issues	
S6	Maintain accurate records of customer issues and actions to resolve	
DC S7	Take ownership of customer issues and actions required to meet customer needs and expectations	

Delivery content

Ref	Skill	Maps to standard
S1	Apprentices will need to show that they have been patient and calm when dealing with challenging customer situation	
S2	Apprentices will need to show that they understand the customers perspective and are sympathetic to the customers needs. This does not mean accepting liability	
S3	This could include: explaining alternative options for customers, readjusting the timeframes for service deliver to meeting customer expectations	
S4	This could include: offering replacement products/services or refunds to customers, as long as the organisational policies and procedures allow this and all pre-requisites have been met	
S5		
S6	This could include: updating customer complaint logbook or similar, passing information on to colleagues who will be taking over the customer issue	
DC S7	The apprentice will need to show that they have taken full ownership to ensure that actions are completed to meet customer needs and expectations. This could involve chasing others for information, updating the customer of the position of their case, responding to all customer queries, following actions through to completion	

DC refers to distinction criteria

**Module 13 Developing self**

Know how to identify areas for development and implement development activities

Ref	Behaviour	Maps to standard
B1	Apprentices will need to: Take ownership for keeping own service knowledge and skills up to date	13B2
B2	Conduct a self-assessment to identify own strengths and weaknesses	13B1
B3	Produce a personal development plan to support achievement of agreed goals	13B2
DC B4	Review and update own personal development plan	
Delivery content		
Ref	Behaviour	Maps to standard
B1	Evidence should include where to find information on services/products and how this has been accessed	
B2	Evidence examples could include a skill scan, SWOT assessment, appraisals, one-to-ones and other work products	
B3	Evidence must include a personal development plan	
DC B4	Evidence must include a personal development plan where development activities have been reviewed and updated	

DC refers to distinction criteria

Module 14 Being open to feedback

Know how to seek and act on feedback to develop service skills and knowledge

Ref	Behaviour	Maps to standard
B1	Apprentices will need to: Seek feedback from others to develop or maintain personal service skills and knowledge	
Ref	Behaviour	Maps to standard
B1	Apprentices will need to ask for and receive feedback from a range of colleagues, customers, managers and relevant others. The feedback must then be acted on to develop or maintain their skills and knowledge to complete their customer service role Evidence examples could include appraisals, team meetings, personal development plans and other work products	

DC refers to distinction criteria

**Module 15 Team working**

Know how to communicate with others and share learning to improve customer service

Ref	Behaviour	Maps to standard
B1	Apprentices will need to: Work with others to help customers	8S5, 8S6
B2	Support achievement of customer needs through effective communication with colleagues	
B3	Support good practice through sharing recommendations and personal learning experiences	8S5
DC B4	Adapt behaviours and communication techniques to meet needs of customers and colleagues	
DC B5	Present justifiable ideas for improving customer service to appropriate others	
Delivery content		
Ref	Behaviour	Maps to standard
B1	Working with others could include: agreeing roles and responsibilities, involving the team in the planning and organising, allocating tasks accordingly to capability, motivating others, taking on extra responsibility	
B2	Communication could be achieved verbally or written, including digital, and could include: sharing customer information, providing updates to colleagues for customers	
B3	Evidence examples could include providing information, guidance and support to others, including new team members, to support their work practices	
DC B4	Evidence examples could include adapting: tone of voice, body language, communication style (written, verbal)	
DC B5	Evidence examples could include providing ideas to colleagues and/or managers, in one-to-ones, appraisals, team meetings, catch up meetings. Ideas must be justified by the apprentice to prove they have thought about the impact of the idea and potential gains/drawbacks	

DC refers to distinction criteria

Module 16 Equality – treating all customers as individuals

Know how to treat customers equally and provide a personalised customer service experience

Ref	Behaviour	Maps to standard
B1	Apprentices will need to: Provide a personalised customer service experience	
B2	Exhibit organisation's core values and service culture through own actions	
Delivery content		
Ref	Behaviour	Maps to standard
B1	Apprentices must recognise and respond to individual needs of customers	
B2	Core values: fundamental beliefs of an organisation Service culture: when employees are motivated to provide a customer-centric approach	

DC refers to distinction criteria



Module 17 Presentation – dress code, professional language
 Know how to show professionalism through personal presentation

Ref	Behaviour	Maps to standard
B1	Apprentices will need to: Face to face only Exhibit professionalism through adherence of dress code and code of conduct	
B2 B3	OR Non-face to face only Exhibit a positive and welcoming approach to customers Maintain consistent professional and positive language when dealing with customers	

Delivery content

Ref	Behaviour	Maps to standard
B1	Apprentices must dress appropriately for the job role and follow the code of conduct set by the organisation	
B2	Apprentices must welcome customers in a positive and professional manner	
B3	Apprentices must provide an ongoing and consistent professional approach using positive language to customers	

DC refers to distinction criteria

Module 18 Right first time

Know how to use communication behaviours to manage customer expectations and take ownership for fulfilling promises

Ref	Behaviour	Maps to standard
B1	Apprentices will need to: Manage customers' needs and expectations through communication skills and knowledge of organisations products and/or services	
B2	Confidently approach customers and remain positive and professional in challenging circumstances	12S1
B3	Demonstrate recognition of own role, responsibilities, authority level and organisational procedures	
B4	Take personal ownership of all stages of the customer journey	
Delivery content		
Ref	Behaviour	Maps to standard
B1	Apprentices will need to identify the needs and expectations of customers and manage these through communication skills and knowledge of the organisation and the products/services offered	
B2	Apprentices will need to be confident in their approach to customers and deal with challenges in a positive and professional manner	
B3	Apprentices will need to show they understand their own role and responsibilities, what their authority level is and the organisational procedures they must adhere to	
B4	Apprentices will need to: <ul style="list-style-type: none"> • Manage the customer journey from beginning to end • Build and maintain relationships • Make contact as agreed • Refer to others and follow up 	

DC refers to distinction criteria



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.

Apprentice showcase

The apprenticeship showcase will cover the following elements of the standard:

Module	Coverage
Understanding the organisation	2K1 – 2K6
Meeting regulations and legislation	3K1 – 3K4
Systems and resources	4K1 – 4K2
Product and service knowledge	7K1 – 7K3
Influencing skills	10S1 – 10S4
Personal organisation	11S1 – 11S3
Dealing with customer conflict and challenge	12S1 – 12S7
Developing self	13B1 – 13B4
Being open to feedback	14B1
Team working	15B1 – 15B5

Practical observation

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

Module	Coverage
Interpersonal skills	8S1 – 8S6
Communication	9S1 – 9S6
Personal Organisation	11S1 – 11S4
Equality	16B1 – 16B2
Presentation	17B1 – 17B3
Right first time	18B1 – 18B4

Professional discussion

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

Module	Coverage
Knowing your customer	1K1 – 1K7
Your role and responsibility	5K1 – 5K3
Customer experience	6K1 – 6K4

Re-Assessment

If an apprentice fails an assessment, this will need to be completed again. Apprentices may complete the other End-point assessments while they prepare to complete the failed assessment. The maximum grade achievable for a retake or resit is a pass. In extenuating circumstances, the apprentice may be able to achieve a distinction on a resit. Please refer to Innovates Retake Policy for further details. For a list of the re-sit costs, please see the Innovate website. It is the responsibility of the employer and the employer provider/training provider to ensure that apprentices are ready to pass the End-point Assessments and it is expected that apprentices will pass the assessments first time.

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.

Assessment method	Area Assessed	Assessed by	Weighting	Marks
Apprenticeship showcase	Understanding the organisation, Meeting regulations and legislation, Systems and resources, Product and service knowledge, Influencing skills, Personal organisation, Dealing with customer conflict and challenge, Developing self, Being open to feedback, Team working	End-point Assessor	65% Minimum of 12 months on programme	Pass - 100% of pass criteria Distinction - 100% of pass criteria AND 70% of the distinction criteria
Practical observation	Interpersonal skills, Communication, Personal organisation, Equality – treating all customers as individuals, Presentation – dress code, professional language, Right first time.	End-point Assessor	20% Minimum of 1 hour and a maximum of 2 hours	Pass - 100% of pass criteria Distinction - 100% of pass criteria AND 80% of the distinction criteria
Professional discussion	Knowing your customers, Your role and responsibilities, Customer experience	End-point Assessor	15% Maximum of 1 hour	Pass - 100% of pass criteria Distinction - 100% of pass criteria AND 75% of the distinction criteria

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



Grading

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

Grade	Requirements	Percentage	
Pass	All pass criteria achieved	100%	
Distinction	All pass criteria achieved plus...	100%	
	Apprentice showcase	7 out of 10 distinction criteria	70%
	Observation	4 out of 5 distinction criteria	80%
	Professional Discussion	3 out of 4 distinction criteria	75%

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 Policy.

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 need to speak to the apprentice directly. Innovate Awarding has a responsibility to accommodate any reasonable request made by the external quality assurance organisation.



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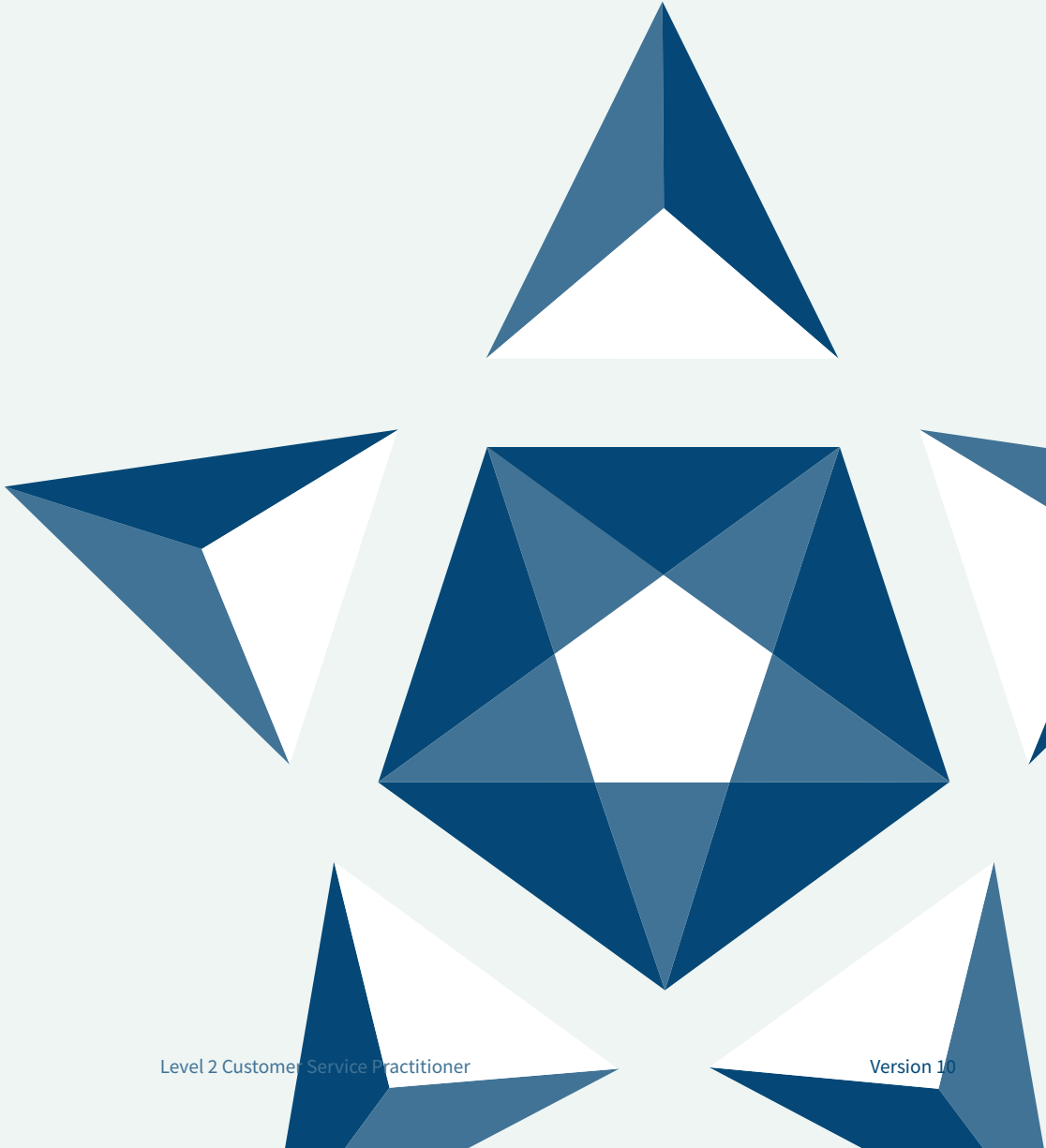
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Further Information

www.innovateawarding.org/apprenticeshipstandards



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Level 2 Customer Service Practitioner

Version 10