



# Assessment Plan

---

Route: Sales, Marketing and Procurement

Standard: Customer Service Specialist

# Apprenticeships and Associated Training Framework

## Assessment Plan

### Route: Sales, Marketing and Procurement

### Standard: Customer Service Specialist

#### 1. Introduction

This document sets out the requirements and process for the end-point assessment of the Customer Service Specialist Level 3 apprenticeship standard. It is written for end-point assessment organisations (EPAOs) who need to know how end-point assessment (EPA) for this apprenticeship must operate. It will also be of interest to customer service specialist apprentices, their employers and training providers.

#### 2. Summary of Assessment

This should be read in conjunction with the Customer Service Specialist standard. Full time apprentices will typically spend no less than 15 months on programme working towards the apprenticeship standard, with a minimum of 20% off-the-job training.

The EPA should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the standard, the pre-requisite Gateway requirement for EPA have been met and that they can be evidenced to an EPA organisation. Employers may wish to take advice from their apprentice's training provider(s).

#### 3. On-Programme Learning

The period of learning, development and formative assessment is managed by the employer, in most cases with support of a training provider. The on-programme pace will be driven by individuals as well as by the breadth of experience an employer can offer, after which end-point assessment will take place.

It is recommended that employers should work closely with any training provider to plan and deliver support and training appropriately. This collaboration will add value to the apprentice as the apprenticeship standard centres on real work competencies demonstrated in real work environment.

To drive quality and consistency through on-programme learning it is recommended that employers consider the following:

- Use of their normal performance management processes to monitor the progress of the apprentice, provide feedback and guide development.

- Employers and training providers should carry out joint reviews of progress at regular intervals, involving apprentices, line managers and others with a direct relationship, e.g. mentors, workplace coaches, etc. They should agree how any issues are to be resolved together.

Use of training providers who will offer on programme support, ensuring the requirements of the apprenticeship standard are reflected in the above processes, and by filling any gaps through their work with apprentices.

- Apprentices must develop and maintain, within a portfolio, examples of their work throughout their apprenticeship. This portfolio will be used by the apprentice to demonstrate to the employer that they are ready for EPA. Some evidence (which has not been assessed by the independent assessor) from this portfolio will be used at a future point to support the professional discussion.

#### 4. Assessment Gateway

The EPA should only commence once the employer is confident that the apprentice has developed all of the knowledge, skills and behaviours defined in the apprenticeship standard and they hold a portfolio to evidence this. Employers in conjunction with the training provider will decide whether the full portfolio meets these requirements. Full time apprentices will spend a minimum of 15 months on-programme working towards the apprenticeship standard, with a minimum of 20% off-the-job training.

Apprentices without English and maths at level 2 on entry must achieve level 2 prior to taking their EPA. For those with an education, health and care plan or a legacy statement, the apprenticeship English and maths minimum requirement is Entry Level 3. British Sign Language qualifications are an alternative to English qualifications for whom this is their primary language.

If unsuccessful at the Assessment Gateway, feedback will be given by the employer and nominated training provider to the apprentice to identify areas for development. This development must be demonstrated by the apprentice before progressing to the end-point assessment.

Following further consultation with the training provider, the employer should sign-off that the apprentice has achieved the requirements of the Assessment Gateway and is ready to proceed to the end-point assessment process.

#### 5. End Point Assessment

The end-point assessment is synoptic and takes place at the end of the apprentice's learning and development. The requirement is that the end-point assessment is completed within 3 months from the start of the end-point assessment period.

The EPA consists of the following three assessment methods.

Assessment method	Timescales for completion	Assessed by	Grading
Practical observation with Q&As.	Within 3 months from the start of the end-point assessment period.	End-point assessment organisation (EPAO).	Fail / Pass / Distinction
Work based project, supported by an interview.	<p>The work-based project is completed within 2 months from the start of the end-point assessment period.</p> <p>The interview will take place before the end of the 3 month end-point assessment period.</p>	End-point assessment organisation (EPAO).	Fail / Pass / Distinction
Professional discussion supported by portfolio evidence.	Within 3 months from the start of the end-point assessment period.	End-point assessment organisation (EPAO).	Fail / Pass / Distinction

The overall EPA must be covered over a maximum period of 3 months after the apprentice has met the EPA Gateway requirements.

EPAOs must ensure that the interview and discussion are conducted in a suitable controlled environment. It is anticipated that EPAOs will use the apprentice’s employer’s premises wherever possible to minimise costs. They may be conducted face-to-face or via an online platform. E.g. video-conferencing. Whether face-to-face or remote, the assessment must be carried out in a quiet room, free from disruption. EPAOs must ensure appropriate methods to prevent misrepresentation are in place should the online option be used.

The requirements for each assessment method are detailed below.

### Assessment Method – Practical Observation (with Q&As)

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

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

- The observation must include questioning to clarify knowledge and understanding is being applied. Standardised questions must be devised by the EPAOs to explore the apprentice's knowledge, skills and behaviour related to the KSBs in Appendix A. Questions must be open questions and independent assessors may ask supplementary questions as required to seek further clarification. Supplementary questions will be devised by the independent assessor as required.
- During the practical observation the apprentice should have the opportunity, if required, to move from one area/function of the business to another in order to best demonstrate how they have applied their KSBs in a realistic work environment to achieve genuine and demanding work objectives.
- The independent assessor must plan the practical observation in conjunction with the apprentice and their employer, taking account of workplace considerations. This would typically include timing, the right environment and enough space for the apprentice to be able to do their job.
- The practical observation must take place in the apprentice's workplace. The amount of questioning time carried out during the observation should not exceed 15% of the total time allowed for the practical observation.
- The practical observation must:
  - Reflect typical working conditions.
  - Allow the apprentice to demonstrate all aspects of the standard being assessed.
  - Take a synoptic approach to assessment the overall competence.
  - Be carried out on a one-to-one basis.
- The apprentice must be given 2 weeks' notice of the practical observation. The observation can be before or after the work-based project but it is recommended not before the professional discussion.
- The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the practical observation.
- Independent assessors must grade the practical observation as fail, pass or distinction using the grading criteria in Appendix B.



### Assessment Method – Work Based Project (supported by an interview)

- Apprentices must submit a written report, on a project they have carried out, to their EPAO 2 weeks prior to an interview date. This date will be agreed when the apprentice passes through the Gateway process.
- The written report must be 2500 words (+/- 10%), excluding annexes. All work on the project will be undertaken following the Gateway process over a two-month period.
- The subject of the project report should be agreed with the EPAO with guidance from the employer in order to allow them to comment on appropriateness for their business but the EPAO must 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.

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

### Interview to Support the Work Based Project

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

- The interview will take place with an independent assessor.
- The interview will last for 60 minutes (+/- 10%)

- The interview will focus on the written project and any supporting annexes.
- The interview can take place either face-to-face or via online video conferencing, if appropriate. EPAOs must ensure that the interview and questioning elements are conducted in a suitable controlled environment. i.e. a quiet room, free from distraction and influence, with the necessary equipment for each assessment method. It is anticipated that EPAOs will use the apprentice's employer's premises, wherever possible, to minimise costs.

The interview will consist of competency-based questions. EPAOs must develop 'test banks' of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure they, and the questions they contain, are fit for purpose.

- The apprentice will be asked 10 questions.
- Independent assessors must grade the work-based project and interview holistically as fail, pass or distinction using the grading criteria in Appendix B as the apprentice's responses in the interview will be assessed in addition to the content of work-based project.
- The independent assessor must use the assessor tools and procedures that are set by the EPAO to record the interview.

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

#### **Assessment Method – Professional Discussion (supported by 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.
- Apprentices must submit the requested portfolio of evidence (10-15 pieces) to their EPAO 2 weeks prior to the professional discussion date. This date will be agreed

when the apprentice passes through Gateway process. This evidence will be considered by the independent assessor and use for the planning to the discussion.

- The professional discussion can be either face-to-face or via online video-conference, if appropriate. EPAOs must ensure that it is conducted in a suitable controlled environment. I.e. a quiet room, free from distraction and influence. It is anticipated that EPAOs will use the apprentice’s employer’s premises, wherever possible, to minimise costs.
- The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the professional discussion. For example, questions will be taken from a template set by the EPAO.
- Independent assessors must grade the professional discussion as fail, pass or distinction using the grading criteria in Appendix B.

## 6. Independence

The end-point assessment organisation must be on the Education and Skills Funding Agency’s (ESFA) Register of End-Points Assessment Organisations (RoEPAO) and they must appoint independent assessors to carry out the assessment activities. The assessment decisions need to be taken by the independent assessors. To ensure consistent and reliable judgements the independent assessor must meet the following criteria:

- Understanding of the customer service sector and of the role covered by the apprenticeship.
- Current occupational competence of 2 years or more.
- No direct relationship with the apprentice, employer or training provider.
- Hold or working towards a qualification to undertaken assessment and verification activity (i.e. PGCE, Cert Ed or Assessor/Verifier qualifications) and/or have significant knowledge and expertise in providing consistent and appropriate judgements of an apprentice’s skill and ability.

## 7. Summary of roles and responsibilities

Role:	Responsibilities
-------	------------------



<p>Employer</p>	<ul style="list-style-type: none"> <li>• Provides coaching and mentoring to the apprentice throughout the duration of the apprenticeship.</li> <li>• Works with the trainer provider to carry out a continuous review of the evidence generated by the apprentice as part of the on-programme assessment process.</li> <li>• Supports ‘on-the-job’ training and offers relevant experience.</li> <li>• Following consultation with the training provider, should sign off that the apprentice has achieved the requirements of the Assessment Gateway and is ready to proceed to the endpoint assessment process.</li> </ul>
<p>Training Provider (this function could be undertaken by the Employer)</p>	<ul style="list-style-type: none"> <li>• Must be on the Education and Skills Funding Agency’s Register of Apprenticeship Training Providers (RoATP).</li> <li>• Delivers ‘off-the-job” training in accordance with the apprenticeship standard.</li> <li>• Works with the employer and undertakes formative assessment of the apprentice against the standards as part of the on-programme assessment process.</li> </ul>
<p>Independent Assessor</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Provides an independent view as they will not have had any prior involvement with the apprentice.</li> <li><input type="checkbox"/> Brings added rigor and consistency to the assessment through their wider industry perspective, knowledge and experience.</li> <li><input type="checkbox"/> Assesses all components of the final end-point assessment independently using the assessment methods and grading descriptors set out in Appendix B</li> <li><input type="checkbox"/> Participates in standardisation events.</li> </ul>
<p>End-point Assessment Organisation (EPAO)</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Must be on the Education and Skills Funding Agency’s (ESFA) Register of End-Point Assessment Organisations (RoEPAO).</li> <li><input type="checkbox"/> Designs and offers the end-point assessments.</li> <li><input type="checkbox"/> Sources, allocates and manages the independent assessors.</li> <li><input type="checkbox"/> Runs standardisation events for independent assessors.</li> <li><input type="checkbox"/> Provides internal/external verification to ensure consistency of assessment decisions.</li> </ul>

## 8 Apprenticeship Grading

The apprenticeship includes Fail, Pass and Distinction grades which are awarded at the end point assessment. The final grade is based on the overall performance in the Practical Observation, Work Based Project and Professional Discussion.

If an apprentice fails any part of the end-point assessment, then it a fail.

Pass apprentices must meet all pass criteria in all assessment methods as described in Appendix B.

Distinction apprentices must meet all the pass criteria and distinction criteria in all assessment methods as described in Appendix B.

If the 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.

Apprentices are able to retake/re-sit any individual assessment component where a pass has not been achieved. If a retake/re-sit is required, apprentices should complete retake/resits within 12 months. There is no limit to the number or retake/re-sits within the 12 months. An 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 EPAO identifies exceptional circumstances accounting for the original fail. If the apprentice fails the work based project they will be asked to rework their project taking account of feedback from the independent assessor. Apprentices will have 1 month to rework their submission.

The apprentice will be able to submit previous evidence along with the new additional evidence.

In the event of extenuating circumstances, apprentices can be given the opportunity to rearrange their date, subject to the agreement of the independent assessors. Any appeals in relation to the outcome of the end-point assessment will be managed by the EPAO whose decision is final.

An independent assessor must combine the grades of all assessment methods to determine the overall EPA grade. Independent assessors' decisions must be subject to moderation by the EPAO – see internal quality assurance below. Decisions must not be confirmed until after moderation.

The table in Annex B outlines the criteria that will be applied for each assessment method. It is based on the following principles:

- All pass criteria need to be achieved; in achieving this, the apprentice will be demonstrating all knowledge, skills and behaviours in the standard.
- All pass and distinction criteria must be achieved for an overall distinction to be achieved.

## Quality Assurance

### Internal Quality Assurance

An approved End-Point Assessment Organisation (EPAO) must have in place a robust mechanism for internal quality assurance. This should include the ongoing monitoring and support of the independent assessment team, including regular standardisation meetings. Standardisation meetings should be undertaken annually to ensure the assessment system is consistent and reliable.

EPAOs for this standard must operate the following:

- Operate moderation of assessment activity and decisions, through examination of documentation and observation of activity, with a minimum of 5% of each independent assessor's assessments moderated.
- Appoint independent assessors that meet the requirements as detailed in this plan.
- Produce training for independent assessors in terms of good assessment practice, operating the assessment tools and grading.
- Have quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation overtime.
- Operate standardisation events that enable assessors to attend a minimum of one event per year.
- Have a robust appeals procedure in place.

To ensure consistency and ensure employer's confidence in the apprentice's assessment in different parts of the country, at different times, by different assessors, all assessment organisations have a responsibility to ensure sufficient standardisation events are attended and Continuing Professional Development (CPD) requirements are met.

All assessment tools must be developed by the EPAO and reviewed on an annual basis, subject to any changes in the standard.

Internal quality assurance must be completed by an appropriately qualified person, and that person must not have been involved in any aspect of the delivery or assessment of the programme they are quality assuring.

### External Quality Assurance:

External quality assurance for this apprenticeship standard will be undertaken by Ofqual.

## Implementation

### Affordability

The cost and practicalities of the assessment have been key considerations in development of the assessment plan due to the range of businesses likely to deliver these apprenticeships. Large, medium and small employers alike must manage the apprenticeship process within organisations of varying sizes and the assessment needs to be affordable for businesses housing small numbers of apprentices.

The rationale for the costs have come from the number of starts, quotes from EPAOs, the assessing methodology and the funding cap. The approach presented offers an affordable and scalable solution to assessment for this Apprenticeship. The end point assessment will be delivered through a mixture of assessment methods and where possible online solutions will be encouraged e.g. use of online media for the submission of the written project and interview and professional discussion.

Expected Starts:

Expected Starts (England)	16-18	19+
Per year once fully established	1,000	7,000

*Data taken from the DFE Apprenticeship level, framework and sector subject area data tool: starts 2011/2012 to 2016/2017 reported to date.*

### Manageability

Assessment tools will be refined to ensure the Apprenticeship Standard and end-point assessment criteria are met in a reliable and valid way. The aim is to ensure small and medium enterprises to take up apprenticeships and to ensure affordability across all employers. It is suggested that the use of digital solutions will help manage costs and time. Several natural peaks are anticipated in September, January and April but with continuous take up throughout the year.

### Professional registration

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

### Delivering Consistent (Reliable) Judgements

At the core of ensuring that judgements on role competence are consistent will be the Apprenticeship Standard which defines what is required for each of the knowledge, skills and behaviour areas to be assessed. In addition, Appendix B further expands on the methods of assessment.

It is recommended that end-point assessment organisations will need to undertake work, in consultation with employers, to develop the EPA tools and processes. These will contain detailed guidance on what is required to achieve each component, and what constitutes the different grades.

Consistency of approach by independent assessors will be achieved through recruitment, training and standardisation. This will cover an understanding of the overall apprenticeship; knowledge of the detailed standard, the grading criteria, examples of relevant evidence and sample marking/grading exercises.

**Appendix A – Knowledge, Skills and Behaviours in the standard to be assessed by each assessment method.**

Knowledge	What the apprentice must know	Method of Assessment
<b>Business Knowledge and Understanding</b>	Understand your organisation's current business strategy in relation to customers and make recommendation for its future.	<b>Work based project (supported by interview)</b>
	Understand the impact your service provision has on the wider organisation and the value it adds	<b>Professional discussion (supported by portfolio evidence)</b>
	Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation	<b>Work based project (supported by interview)</b>
	Understand the principles and benefits of being able to think about the future when taking action or making service related decisions	<b>Work based project (supported by interview)</b>
	Understand a range of leadership styles and apply them successfully in a customer service environment	<b>Professional discussion (supported by portfolio evidence)</b>
Knowledge	What the apprentice must know	Method of Assessment
<b>Customer Journey knowledge</b>	Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience	<b>Work based project (supported by interview)</b>
	Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention	<b>Professional discussion (supported by portfolio evidence)</b>
	Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation	<b>Work based project (supported by interview)</b>
	Understand commercial factors and authority limits for delivering the required customer experience	<b>Professional discussion (supported by portfolio evidence)</b>

Knowledge	What the apprentice must know	Method of Assessment
-----------	-------------------------------	----------------------



<b>Knowing your customers and their needs/Customer Insight</b>	Know your internal and external customers and how their behaviour may require different approaches from you	<b>Professional discussion (supported by portfolio evidence)</b>
	How to analyse, use and present a range of information to provide customer insight	<b>Practical observation (with Q&amp;As)</b>
	Understand what drives loyalty, retention and satisfaction and how they impact on your organisation	<b>Professional discussion (supported by portfolio evidence)</b>
	Understand different customer types and the role of emotions in bringing about a successful outcome	<b>Practical observation (with Q&amp;As)</b>
	Understand how customer expectations can differ between cultures, ages and social profiles	<b>Practical observation (with Q&amp;As)</b>
<b>Knowledge</b>	<b>What the apprentice must know</b>	<b>Method of Assessment</b>
<b>Customer service culture and environment awareness</b>	Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers	<b>Practical observation (with Q&amp;As)</b>
	Understand your business environment and culture and the position of customer service within it	<b>Work based project (supported by interview)</b>
	Understand your organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong	<b>Work based project (supported by interview)</b>
	Understand how to find and use industry best practice to enhance own knowledge	<b>Professional discussion (supported by portfolio evidence)</b>

<b>Skills</b>	<b>What the apprentice must know</b>	<b>Method of Assessment</b>
<b>Business focused service delivery</b>	Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice	<b>Work based project (supported by interview)</b>

	Resolve complex issues by being able to choose from and successfully apply a wide range of approaches	Practical observation (with Q&As)
	Find solutions that meet your organisation's needs as well as the customer requirements	Practical observation (with Q&As)
Skills	What the apprentice must know	Method of Assessment
<b>Providing a positive customer experience</b>	Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes	Practical observation (with Q&As)
	Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy	Practical observation (with Q&As)
	Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps	Practical observation (with Q&As)
	Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction	Work based project (supported by interview)
	Demonstrate a cost-conscious mind-set when meeting customer and the business needs	Professional discussion (supported by portfolio evidence)
	Identify where highs and lows of the customer journey produce a range of emotions in the customer	Practical observation (with Q&As)
	Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format	Practical observation (with Q&As)

Skills	What the apprentice must know	Method of Assessment
<b>Working with your customers / customer insights</b>	Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it	Work based project (supported by interview)
	Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service	Work based project (supported by interview)

Skills	What the apprentice must know	Method of Assessment
<b>Customer service performance</b>	Maintain a positive relationship even when you are unable to deliver the customer's expected outcome	<b>Practical observation (with Q&amp;As)</b>
	When managing referrals or escalations take into account historical interactions and challenges to determine next steps	<b>Practical observation (with Q&amp;As)</b>
Skills	What the apprentice must know	Method of Assessment
<b>Service improvement</b>	Analyse the end to end service experience, seeking input from others where required supporting development of solutions	<b>Work based project (supported by interview)</b>
	Make recommendations based on your findings to enable improvement	<b>Work based project (supported by interview)</b>
	Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice	<b>Work based project (supported by interview)</b>

Behaviours	What the apprentice must know	Method of Assessment
<b>Develop self</b>	Proactively keep your service, industry and best practice knowledge and skills up-to-date	<b>Professional discussion (supported by portfolio evidence)</b>
	Consider personal goals related to service and take action towards achieving them	<b>Professional discussion (supported by portfolio evidence)</b>
Behaviours	What the apprentice must know	Method of Assessment
<b>Ownership / Responsibility</b>	Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation	<b>Practical observation (with Q&amp;As)</b>

	Exercises proactivity and creativity when identifying solutions to customer and organisational issues	Practical observation (with Q&As)
	Make realistic promises and deliver on them	Professional discussion (supported by portfolio evidence)
<b>Behaviours</b>	<b>What the apprentice must know</b>	<b>Method of Assessment</b>
<b>Team working</b>	Work effectively and collaboratively with colleagues at all levels to achieve results	Practical observation (with Q&As)
	Recognise colleagues as internal customers	Practical observation (with Q&As)
	Share knowledge and experience with others to support colleague development	Professional discussion (supported by portfolio evidence)
<b>Behaviours</b>	<b>What the apprentice must know</b>	<b>Method of Assessment</b>
<b>Equality</b>	Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer	Practical observation (with Q&As)
	Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment	Practical observation (with Q&As)
<b>Behaviours</b>	<b>What the apprentice must know</b>	<b>Method of Assessment</b>
<b>Presentation</b>	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction	Practical observation (with Q&As)
	Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand	Practical observation (with Q&As)

--	--	--

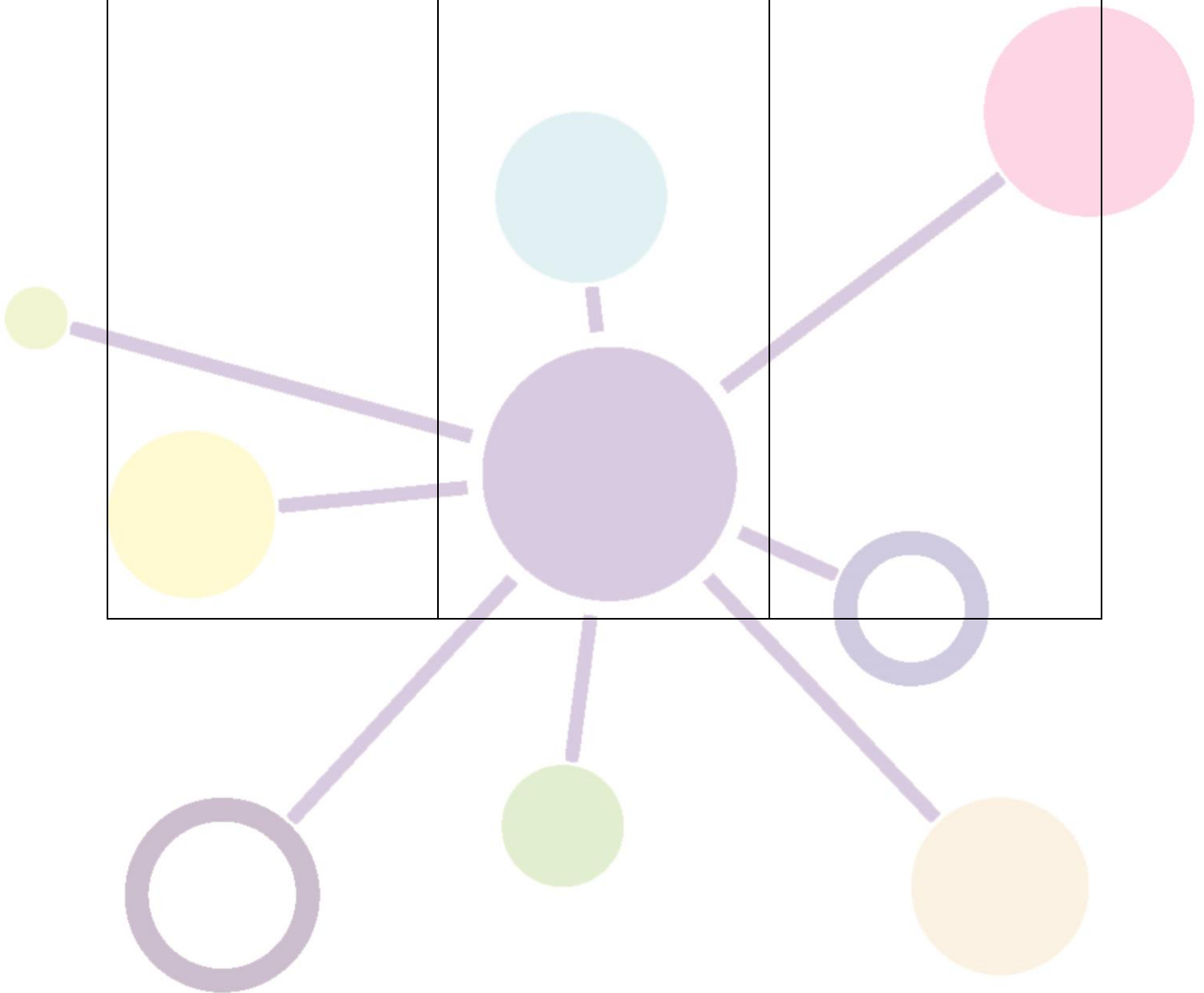
**Appendix B – Grading descriptors**

**Practical observation (with Q&As)**

Fail	Pass	Distinction
<p>Fail Criteria: the apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria.</p>	<p>Pass Criteria: the apprentice must display all the following:</p>	<p>Distinction Criteria: the apprentice must display all the pass criteria and all the following:</p>
<p>Shows a little or no understanding of their role in meeting the organisation’s customer service standard.</p> <p>Does not fully know or understand their organisation’s service level agreement.</p> <p>Provides insufficient evidence to demonstrate an understanding of customer expectations.</p>	<p>Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.</p> <p>An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.</p> <p>Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.</p> <p>Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction.</p>	<p>Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.</p> <p>Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.</p>



	<p>An ability to assess situations and offer clear explanations, options and solutions that</p>	
--	---	--



	<p>balance customer and organisational requirements.</p> <p>Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.</p> <p>Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.</p> <p>Recognises when customer emotions have been affected by the level of service offered.</p> <p>Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.</p> <p>Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.</p> <p>Evidences when they have maintained a positive relationship even when they are unable to deliver the customer's expected outcome.</p>	
--	---	--

	<p>Evidences how they recognise when customer expectations are not met and demonstrates how, using appropriate communication techniques, this could be managed to maintain a positive relationship.</p> <p>Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.</p> <p>Shows proactivity and creativity when identifying solutions to customer and organisational issues.</p> <p>Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures.</p> <p>Demonstrates achievement of results through effective team work and collaboration with colleagues at all levels.</p> <p>Shows adaptability of own skills when working with internal customers.</p>	
--	--	--

	<p>Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.</p> <p>Evidence to show how their personal presentation made a positive impact on their organisation's brand.</p> <p>Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.</p> <p>Demonstrates how they analyse, use and present a range of information in order to provide customer insight.</p>	
--	--	--

**Work-based project (supported by interview)**

Fail	Pass	Distinction
<p>Fail Criteria: the apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria.</p>	<p>Pass Criteria: the apprentice must display all the following:</p>	<p>Distinction Criteria: the apprentice must display all the pass criteria and all the following:</p>
<p>Fails to recommend improvements in customer service provision.</p>	<p>Evidence that they understand the impact of the organisation's mission statement and business strategy on customer service</p>	<p>Evidence to support their research and analysis of customer service standards and mission statements of other organisations, in</p>

<p>Does not demonstrate an understanding of customer journeys.</p> <p>Shows limited ability in understanding customer journeys to ensure successful outcomes.</p>	<p>delivery and make recommendations for future improvements.</p> <p>Ability to recommend improvement to the customer service provision, the steps required to implement this change and the benefit this change could have on the organisation and their own role.</p> <p>Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.</p> <p>An understanding of the underpinning business processes that support them on bringing about the best outcome for customers and their organisation.</p> <p>Provides evidence to show how they identify information which can be used by their organisation to provide customer insight and identify how this information can be analysed, used and presented.</p> <p>Ability to discuss the internal and external factors influencing their business environment and culture.</p>	<p>comparison to their own organisations, to inform their recommendations.</p> <p>Ability to consider the possible impact on their organisation of not considering the future in decision-making.</p> <p>Demonstrates how knowing their customer and their needs has a direct impact on: a. their working practices b. organisational policy / procedures</p> <p>Ability to demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation.</p> <p>Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s).</p> <p>Provides evidence to show when they analyse the risks and opportunities to implementing change.</p> <p>Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended alternative methods likely</p>
---	--	---



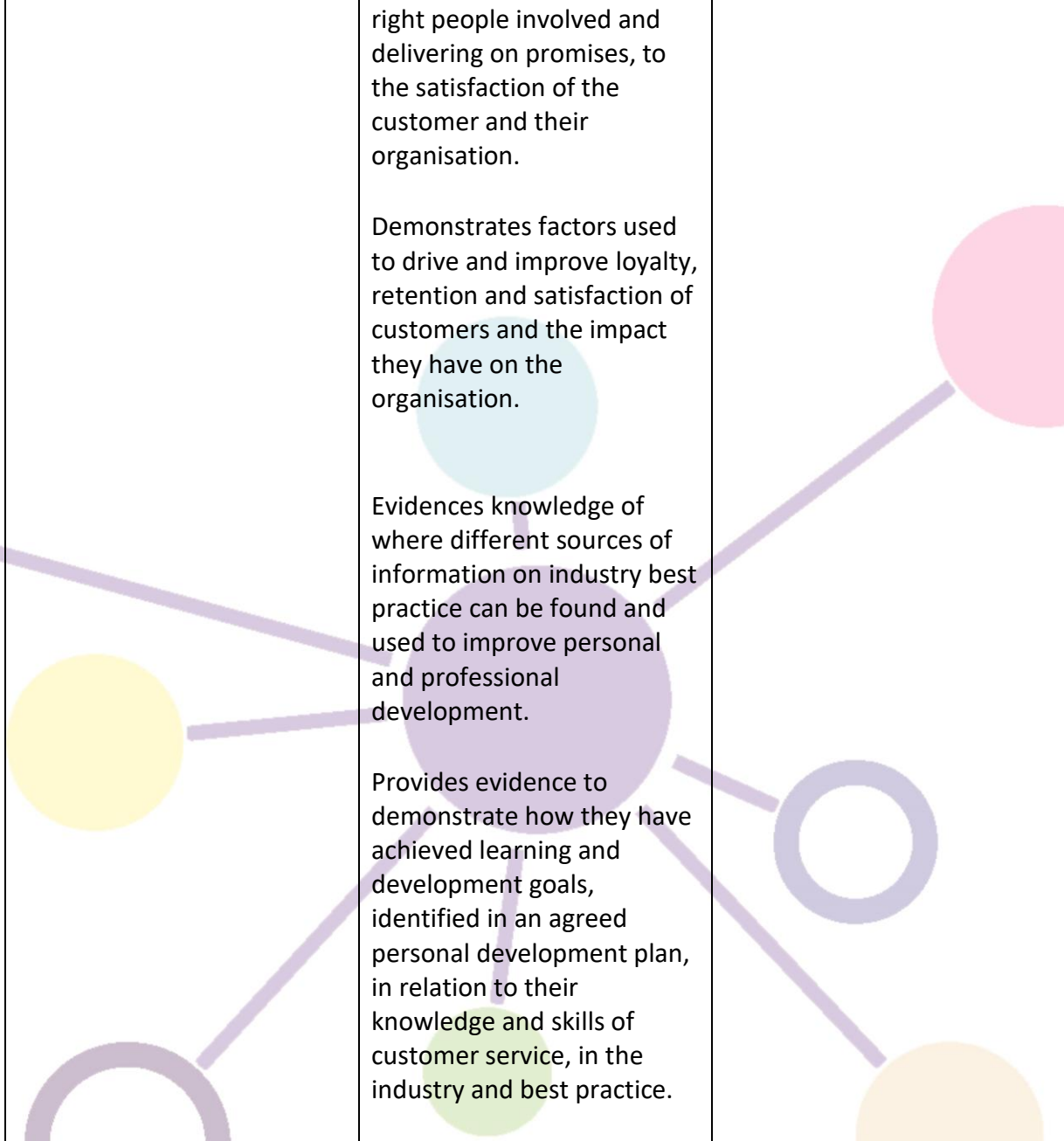
	<p>Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery.</p> <p>Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.</p> <p>Ability to identify potential causes of service failure and the consequences of these.</p> <p>Evidences when they made decisions and recommendations to improve their own customer service delivery.</p> <p>Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.</p> <p>Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements.</p> <p>Ability to gather and analyse information about the types of customers their</p>	<p>to improve results, stating reasons for choice.</p> <p>Evidence to show when they have proactively gathered customer feedback, through a variety of methods and used alternative recommendations to change the customer service level agreement in order to provide an improved service.</p> <p>Demonstrates an ability to identify trends/recurring issues and analyse why they occurred and record possible ways of addressing them to ensure they do not reoccur.</p>
--	--	---

	<p>organisation has and explain how the service they provide meets their potential needs and expectations.</p> <p>Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.</p> <p>Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required.</p> <p>Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.</p>	
--	---	--

**Professional discussion (supported by portfolio evidence)**

Fail	Pass	Distinction
<p>Fail Criteria: the apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria.</p>	<p>Pass Criteria: the apprentice must display all the following:</p>	<p>Distinction Criteria: the apprentice must display all the pass criteria and all of the following:</p>
<p>Does not understand the content and importance of the organisation’s service level agreement.</p>	<p>Ability to describe their role in meeting their organisation’s customer service standards and its impact upon other departments.</p>	<p>Evidences when they have assessed the impact of sharing their own knowledge on: a. their development</p>

<p>Demonstrates limited knowledge and understanding of whom the internal and external customers are and their expectations.</p> <p>Provides no knowledge and understanding of leadership styles.</p> <p>Gives ineffective evidence of personal learning and development goals and shows no understanding of how they can be achieved.</p>	<p>Evidence of how they identify the different types of leadership styles that work best in their customer environment.</p> <p>Demonstrates when they have balanced the meeting of their customer and their organisation's needs while showing they have considered cost implications.</p> <p>Demonstrate sharing own knowledge and experience with others, to support colleague development.</p> <p>Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.</p> <p>Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.</p> <p>Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations.</p> <p>Demonstrates responsibility and ownership in resolving customer issues, by getting the</p>	<p>b. colleague development</p> <p>Evidences when they have analysed the importance of their professional image and its relationship with the organisation's brand.</p> <p>Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach.</p>
---	---	---



	<p>right people involved and delivering on promises, to the satisfaction of the customer and their organisation.</p> <p>Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.</p> <p>Evidences knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development.</p> <p>Provides evidence to demonstrate how they have achieved learning and development goals, identified in an agreed personal development plan, in relation to their knowledge and skills of customer service, in the industry and best practice.</p>	
--	--	--