



# Standard Document

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Route – Sales, Marketing and Procurement

Standard – Customer Service Specialist

Status: Approved for delivery  
 Level: 3  
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 Version: 1  
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 Route: Sales, marketing and procurement  
 Typical duration: 15 months  
 Maximum funding: £4000

**Role / Occupation:** Customer Service Specialist

**Overview:** The main purpose of a customer service specialist is to be a ‘professional’ for direct customer support within all sectors and organisation types. You are an advocate of Customer Service who acts as a referral point for dealing with more complex or technical customer requests, complaints, and queries. You are often an escalation point for complicated or ongoing customer problems. As an expert in your organisation’s products and/or services, you share knowledge with your wider team and colleagues. You gather and analyse data and customer information that influences change and improvements in service. Utilising both organisational and generic IT systems to carry out your role with an awareness of other digital technologies. This could be in many types of environment including contact centres, retail, webchat, service industry or any customer service point.

**Knowledge**

**Business Knowledge and Understanding**

Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation

Understand the impact your service provision has on the wider organisation and the value it adds

Understand your organisation’s current business strategy in relation to customers and make recommendations for its future

Understand the principles and benefits of being able to think about the future when taking action or making service related decisions

Understand a range of leadership styles and apply them successfully in a customer service environment

Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience

Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention

Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation

Understand commercial factors and authority limits for delivering the required customer experience

Know your internal and external customers and how their behaviour may require different approaches from you

Understand how to analyse, use and present a range of information to provide customer insight

Understand what drives loyalty, retention and satisfaction and how they impact on your organisation

Understand different customer types and the role of emotions in bringing about a successful outcome

Understand how customer expectations can differ between cultures, ages and social profiles

Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers

Understand your business environment and culture and the position of customer service within it

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

**Customer Journey knowledge**

**Knowing your customers and their needs/ Customer Insight**

**Customer service culture and environment awareness**

Understand how to find and use industry best practice to enhance own knowledge

**Skills**

**Business focused service delivery**

Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice

Resolve complex issues by being able to choose from and successfully apply a wide range of approaches

Find solutions that meet your organisations needs as well as the customer requirements

**Providing a positive customer experience**

Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes

Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy

**- Providing a positive customer experience (cont.)**

Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps

Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction

Demonstrate a cost conscious mind-set when meeting customer and the business needs

Identifying where highs and lows of the customer journey produce a range of emotions in the customer

Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format

**Working with your customers / customer insights**

Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it

Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service

**Customer service performance**

Maintain a positive relationship even when you are unable to deliver the customer's expected outcome

When managing referrals or escalations take into account historical interactions and challenges to determine next steps

**Service improvement**

Analyse the end to end service experience, seeking input from others where required, supporting development of solutions

Make recommendations based on your findings to enable improvement

Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice

**Behaviours / Attitude**

**Develop self**

Proactively keep your service, industry and best practice knowledge and skills up-to-date

Consider personal goals related to service and take action towards achieving them

**Ownership/ Responsibility**

Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation

Exercises proactivity and creativity when identifying solutions to customer and organisational issues

Make realistic promises and deliver on them

Work effectively and collaboratively with colleagues at all levels to achieve results.

### Team working

Recognise colleagues as internal customers

Share knowledge and experience with others to support colleague development

Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer

### Equality

Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment

### Presentation

Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction

Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand

**Duration:** The apprenticeship will take a minimum of 15 months to complete depending on experience.

**Entry Requirements:** Organisations will set their own entry criteria and are more likely to select individuals with more advanced inter- personal skills, experience of working with customers in some capacity. You must achieve level 2 English and maths prior to taking the end point assessment.

**Link to 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.

**Level:** Level 3.

**Review:** The apprenticeship should be reviewed after a maximum of 3 years.

