Training Qualifications UK

TQUK Level 3 End-Point Assessment for ST0071 **Customer Service Specialist** V1.0

Qualification Number: 603/3830/1

Standard Specification

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Key Information

Reference:	ST0071
Version:	V1.0
Level:	3
Typical duration to gateway:	15 months
EPA period:	3 months
Maximum funding:	£4,000
Route:	Sales, marketing and procurement
Approved for delivery:	10 May 2018
Date Updated:	11/12/2020
Lars code:	278
EQA provider:	Ofqual
Qualification Number	603/3830/1

Apprenticeship Summary

Overview of the Role

Dealing with customer queries, purchases and complaints.

Occupation Summary

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

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 the apprentice choose to progress on a customer service career path, they may be eligible for further professional membership, including management.

Assessment Methods

This end-point assessment (EPA) consists of three assessment methods:

Practical observation with question and answers

Professional discussion supported by the portfolio of evidence

Work based project supported by an interview

Assessment Order

There is no prescribed order, between the work based project and the practical observation, but it is recommended that the professional discussion is the final assessment method.

EPA Window

All EPA components must be completed within three months of the start of the end-point assessment period.

Gateway Considerations

Before the apprentice can start their EPA, the training provider is required to upload the following:

- photo ID
- portfolio of evidence
- work based project proposal.

At gateway, the training provider is also requested sign a declaration to confirm that the English and maths requirements have been met in line with the funding rules.

Observation with Q&A

Planning the Observation

The apprentice will be given a minimum of two weeks' notice of the practical observation date.

The practical observation must:

- reflect typical working conditions
- allow the apprentice to demonstrate all aspects of the standard
- take a synoptic approach to assessment of the overall competence
- be carried out on a one-to-one basis.

Practical Observation

The practical observation must take place in the apprentice's workplace.

The observation period will last **60 minutes**. A 10% (+/-) variance is permitted at the End-Point Assessor's discretion to allow the apprentice to complete their task. No new tasks will be observed after the time limit has been reached.

The apprentice will be observed by the End-Point Assessor, undertaking a range of day-to-day workplace activities. Their practical observation will involve undertaking activities which allow them to demonstrate the full range of the knowledge, skills and behaviours (KSBs) required.

During the practical observation, the apprentice has the opportunity, if required, to move from one area or 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.

Questioning Session

Following the practical observation, a question and answer session will take place.
The practical observation aims to maximise naturally-occurring opportunities, however it is understood and appreciated that it may not be possible to observe all pass and distinction criteria during the time set aside for the observation. Therefore, criteria which do not occur naturally during the practical observation will be tested during the question and answer part of this assessment to give the apprentice an opportunity to demonstrate their knowledge and give examples of their competency against these areas, enabling them to reach all grade boundaries.
The questioning period will last for no longer than 15% of the time allotted for the practical observation. Therefore, the question and answer session will last for up to **10 minutes**, following the 60-minute (+/-10%) practical observation.

Grading

The practical observation is graded as distinction, pass or fail according to the grading criteria.

To achieve a pass in this assessment, the apprentice must meet all the pass criteria. To be awarded a distinction, they must meet all the pass criteria and all the distinction criteria.

If they do not meet all the pass criteria, this assessment will be graded as a fail.

KSBs and Grading Criteria

Knowledge	**Knowing your Customers and their Needs/Customer Insight**	
	Standard	
	How to analyse, use and present a range of information to provide customer insight	
	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	
	Pass	**Distinction**
	Demonstrates how they analyse, use and present a range of information in order to provide customer insight.	N/A
	An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.	
	Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.	
	Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.	
	Customer Service Culture and Environment Awareness	
	Standard	
	Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how they deliver for customers	
	Pass	**Distinction**
	Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.	N/A

Skills		
	Business-Focused Service Delivery	
	Standard	
	Resolve complex issues by being able to choose from and successfully apply a wide range of approaches	
	Find solutions that meet their organisation's needs as well as the customer requirements	
	Pass	**Distinction**
	Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.	N/A
	An ability to assess situations and offer clear explanation, options and solutions that balance customer and organisational requirements.	
	Providing a Positive Customer Experience	
	Standard	
	Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes	
	Manage challenging and complicated situations within their level of authority and make recommendations to enable and deliver change to service or strategy	
	Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps	
	Identify 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	
	Pass	**Distinction**
	Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.	Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.
	Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction.	
	Recognises when customer emotions have been affected by the level of service offered.	Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.
	Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.	

Skills	Customer Service Performance	
	Standard	
	Maintain a positive relationship even when they 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	
	Pass	**Distinction**
	Evidences when they have maintained a positive relationship, even when they are unable to deliver the customer's expected outcome.	N/A
	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.	
	Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.	

Behaviours	**Ownership / Responsibility**	
	Standard	
	Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and their organisation	
	Exercises proactivity and creativity when identifying solutions to customer and organisational issues	
	Pass	**Distinction**
	Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures.	N/A
	Shows proactivity and creativity when identifying solutions to customer and organisational issues.	
	Team working	
	Standard	
	Work effectively and collaboratively with colleagues at all levels to achieve results	
	Recognise colleagues as internal customers	
	Pass	**Distinction**
	Demonstrates achievement of results through effective team work and collaboration with colleagues at all levels.	N/A
	Shows adaptability of own skills when working with internal customers.	
	Equality	
	Standard	
	Adopt a positive and enthusiastic attitude being open minded and able to tailor their service to each customer	
	Be adaptable and flexible to their customer needs whilst continuing to work within the agreed customer service environment	
	Pass	**Distinction**
	Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.	N/A

Behaviours	Presentation	
	Standard	
	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction	
	Ensure their personal presentation, in all forms of communication, reflects positively on their organisation's brand	
	Pass	**Distinction**
	Demonstrates brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.	N/A
	Evidence to show how their personal presentation made a positive impact on their organisation's brand.	

Work Based Project

Work Based Project Report Overview

The work based project involves the apprentice completing a relevant and defined piece of work that has a real business benefit (after the proposal has been approved). The work based project should be designed to allow the knowledge, skills and behaviours (KSBs) to be assessed for the end-point assessment.

This assessment comprises two components:

- a work based project (including work based project proposal submitted at EPA gateway);
- an interview.

Work Based Project Proposal

Prior to gateway, and **before starting the work based project report,** the apprentice will need to write a work based project proposal.

The purpose of the work based project proposal is for the apprentice to outline, in no more than 500 words, what their project is about, and to demonstrate a **specific high level challenge** they have encountered and how this challenge has the potential to meet KSBs assigned to this assessment components. This will be discussed in the assessment planning meeting.

If the apprentice's work based project proposal is **not accepted** by the End-Point Assessor, the apprentice will have one week to submit a re-worked project proposal using any feedback provided and the reason/s behind the initial submission being rejected.

If the work based project proposal **is accepted,** the End-Point Assessor will sign this off and the apprentice will then commence work on the work based project report.

Work Based Project Report

The apprentice must start the work on their work based project report following the approval of the proposal at the assessment planning meeting.

If the work based project proposal is accepted, the apprentice will have two months from assessment planning meeting to write and submit the work based project.

The employer must ensure that the apprentice has sufficient time and resources to plan and undertake the research and produce their written report.

The specific high level challenge the apprentice will describe in their project report could have taken place at any time during the apprenticeship and prior to their gateway, but the apprentice **cannot not write about it or complete their project report** until the project proposal has been approved.

The subject of the work based project report should cover a **specific high level challenge** such as a complaint or difficult situation that the apprentice has dealt with, explaining:

- what was the complaint/situation they were involved in
- what actions (planning and execution) they took
- what solutions were offered
- details of any recommendations they made to change a policy or process
- any feedback from the customer
- what their responsibilities were, and
- what were the results.

The work based project report will be **2,500 words (+/-10%)**.

The work based project report should contain annexes/appendices that are relevant to the apprentice and are related to the actions they undertook in relation to the high level challenge. Example of evidence that could be included in the annex/appendices are:

- emails
- letters
- meeting notes
- call logs
- work flow documents
- feedback.

Any work based project report that does not meet the minimum word count will be considered a fail. Anything exceeding the upper limit of the word count of 2750 words, will not be assessed and therefore not contribute to the overall grade.

Interview

The work based project report will be supported by an interview which will take place at least two weeks after the apprentice has submitted their work based project report to give the End-Point Assessor time to review their work and prepare for the interview aspect of the assessment.

This is a formal assessment which must take place in a controlled environment. The interview will last for **60 minutes (+/-10%)** and will focus on the written project and any supporting annexes. During the interview, the apprentice will be asked **10 competency-based questions**.

The questions will be based on KSBs assigned to this assessment component and may take the following format:

Business Knowledge and Understanding

- How have their recommendations impacted their organisation?

Customer Journey Knowledge

- What are the business processes that underpin the best outcome for their customers?

Service Improvement

- What qualitative and quantitative data does their organisation gather and how do they use it?

Grading

This assessment is graded distinction, pass or fail according to the grading criteria.

To achieve a pass in this assessment, the apprentice must meet all the pass criteria. To be awarded a distinction, they must meet all the pass criteria and all the distinction criteria.

If the apprentice does not meet all the pass criteria, this assessment will be graded as a fail.

KSBs and Grading Criteria

<table>
<tr><td rowspan="11">Knowledge</td><td colspan="3">Business Knowledge and Understanding</td></tr>
<tr><td colspan="3">Standard</td></tr>
<tr><td colspan="3">Understand their organisation's current business strategy in relation to customers and make recommendation for its future.</td></tr>
<tr><td colspan="3">Understand what continuous improvement means in a service environment and how the apprentice's recommendations for change impact their organisation</td></tr>
<tr><td colspan="3">Understand the principles and benefits of being able to think about the future when taking action or making service related decisions</td></tr>
<tr><td>Pass</td><td colspan="2">Distinction</td></tr>
<tr><td>Evidence that they understand the impact of the organisation's mission statement and business strategy on customer service delivery and make recommendations for future improvements.</td><td colspan="2">Evidence to support their research and analysis of customer service standards and mission statements of other organisations, to inform their recommendations.</td></tr>
<tr><td>Demonstrates the 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.</td><td colspan="2">Demonstrate the ability to consider the possible impact on their organisation of not considering the future in decision-making.</td></tr>
<tr><td colspan="3">Customer Journey Knowledge</td></tr>
<tr><td colspan="3">Standard</td></tr>
<tr><td colspan="3">Understand and critically evaluate the possible journeys of their customers, including challenges and the end-to-end experience</td></tr>
<tr><td colspan="3">Understand the underpinning business processes that support them in bringing about the best outcome for customers and their organisation</td></tr>
<tr><td colspan="2">Pass</td><td>Distinction</td></tr>
<tr><td colspan="2">Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.</td><td rowspan="2">N/A</td></tr>
<tr><td colspan="2">Demonstrates an understanding of the underpinning business processes that support them on bringing about the best outcome for customers and their organisation.</td></tr>
</table>

Knowledge	**Customer Service Culture and Environment Awareness**	
	Standard	
	Understand their business environment and culture and the position of customer service within it	
	Understand their organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong	
	Pass	**Distinction**
	Demonstrates the ability to discuss the internal and external factors influencing their business environment and culture.	Demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation.
	Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery.	
	Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.	
	Demonstrates the ability to identify potential causes of service failure and the consequences of these.	

Skills		
	Business Focused Service Delivery	
	Standard	
	Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice	
	Pass	**Distinction**
	Evidences when they made decisions and recommendations to improve their own customer service delivery.	Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended alternative methods likely to improve results, stating reasons for choice.
	Providing a Positive Customer Experience	
	Standard	
	Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction	
	Pass	**Distinction**
	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.	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.
	Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.	

Skills		
	Working with your Customers / Customer Insights	
	Standard	
	Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it	
	Analyse their customer types, to identify or anticipate their potential needs and expectations when providing their service	
	Pass	**Distinction**
	Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements.	Demonstrates how knowing their customer and their needs has a direct impact on: a. their working practices b. organisational policy / procedures
	Ability to gather and analyse information about the types of customers their organisation has and explain how the service they provide meets their potential needs and expectations.	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.
	Service Improvement	
	Standard	
	Analyse the end to end service experience, seeking input from others where required supporting development of solutions	
	Make recommendations based on their findings to enable improvement	
	Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice	
	Pass	**Distinction**
	Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.	Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s).
	Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required	Provides evidence to show when they analyse the risks and opportunities to implementing change.
	Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.	

Portfolio of Evidence

To support the professional discussion, the apprentice must produce a portfolio of evidence.

From the apprentice's on-programme portfolio, they will need to select **a minimum of 10 and a maximum of 15** pieces of evidence which will best support them in their professional discussion.

Evidence may include, but is not limited to:

- witness statements;
- customer feedback such as emails or letters;
- manager feedback from one-to-one meetings or similar.

While the portfolio itself is not directly assessed, it will be used to form a basis for the professional discussion and is therefore essential for end-point assessment.

To support the apprentice in the compilation of the portfolio of evidence, a **Portfolio Mapping and Tracking Form** is available on EPAPro under the 'Support Materials' section. This will allow them to map evidence to specific knowledge, skills and behaviours, providing a checklist for the apprentice and also a tool for the End-Point Assessor to identify the purpose of the evidence they have included.

Professional Discussion

The professional discussion can take place face-to-face or remotely.

Following the submission of the apprentice's portfolio, the End-Point Assessor would have prepared questions for the professional discussion based on the contents of the apprentice's portfolio and relevant to the KSBs assigned to this assessment.

The professional discussion will last **60 minutes**. A 10% (+/-) variance is permitted at the End-Point Assessor's discretion to allow the apprentice to finish their final answer or point. No new questions will be asked after the time limit has been reached.

The End-Point Assessor will ask the apprentice a series of questions linked to each of the following modules:

- Business knowledge and understanding
- Customer journey knowledge
- Knowing their customers and their needs/customer insights
- Customer service culture and environment awareness
- Providing a positive customer experience
- Team working
- Developing
- Ownership/responsibility.

During the professional discussion, the End-Point Assessor may ask the apprentice follow-up questions that lead on from their initial question. This is in order to test the apprentice's knowledge and skills further.

To help inform and validate the apprentice's responses, they may refer to their portfolio and to notes.

Grading

This assessment is graded as distinction, pass or fail according to the grading criteria.

To achieve a pass in this assessment, the apprentice must meet all the pass criteria. To be awarded a distinction, they must meet all the pass criteria and all the distinction criteria.

If the apprentice does not meet all the pass criteria, this assessment will be graded as a fail.

KSBs and Grading Criteria

Knowledge	**Business Knowledge and Understanding**	
	Standard	
	Understand the impact their service provision has on the wider organisation and the value it adds	
	Understand a range of leadership styles and apply them successfully in a customer service environment	
	Pass	**Distinction**
	Demonstrates the ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments	Evidences when they have analysed the importance of their professional image and its relationship with the organisation's brand.
	Evidence of how they identify the different types of leadership styles that work best in their customer environment.	
	Customer Journey knowledge	
	Standard	
	Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention	
	Understand commercial factors and authority limits for delivering the required customer experience	
	Pass	**Distinction**
	Demonstrates an understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.	N/A
	Demonstrates the ability to adhere to their organisation's service level agreement and demonstrates and awareness of the limit of their authority when providing customer service.	
	Knowing Your Customers and Their Needs/Customer Insight	
	Standard	
	Know their internal and external customers and how their behaviour may require different approaches from the apprentice	
	Understand what drives loyalty, retention and satisfaction and how they impact on their organisation	
	Pass	**Distinction**
	Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations.	N/A
	Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.	

Knowledge	**Customer Service Culture and Environment Awareness**	
	Standard	
	Understand how to find and use industry best practice to enhance own knowledge	
	Pass	**Distinction**
	Evidences knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development.	N/A

Skills	**Providing a Positive Customer Experience**	
	Standard	
	Demonstrate a cost-conscious mind-set when meeting customer and the business needs	
	Pass	**Distinction**
	Demonstrates when they have balanced the meeting of their customer and their organisation's needs, while showing they have considered cost implications.	N/A

Behaviours	**Develop Self**	
	Standard	
	Proactively keep their service, industry and best practice knowledge and skills up-to-date	
	Consider personal goals related to service and take action towards achieving them	
	Pass	**Distinction**
	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.	Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future- focused approach.
	Ownership / Responsibility	
	Standard	
	Make realistic promises and deliver on them	
	Pass	**Distinction**
	Demonstrates responsibility and ownership in resolving customer issues, by getting the right people involved and delivering on promises, to the satisfaction of the customer and their organisation.	N/A
Behaviours	**Team Working**	
	Standard	
	Share knowledge and experience with others to support colleague development	
	Pass	**Distinction**
	Demonstrates sharing own knowledge and experience with others, to support colleague development.	Evidences when they have assessed the impact of sharing their own knowledge on: A. their development; B. colleague development.

Overall Grading

This standard is graded as distinction, pass or fail. Each assessment component is graded individually. Once the apprentice has completed all assessment components, the grades are combined as described in the table below to determine their overall grade.

Observation	Work Based Project	Professional Discussion	Overall Grade
Pass	Pass	Pass	Pass
	Distinction	Distinction	
Distinction	Pass	Pass	
	Distinction	Distinction	Distinction
A fail in any assessment component will result in a fail overall.			

Resits and Retakes

If the apprentice fails any of the assessment components, they will be eligible for a resit or retake.

If the apprentice requires a resit or retake, their overall EPA grade will be capped at a pass, unless Training Qualifications UK determines there are exceptional circumstances the full range of grades will be available to them.

The apprentice is able to retake/re-sit any individual assessment component where a pass has not been achieved. If a retake/re-sit is required, they should complete retakes/re-sits within 12 months.

Appeals

Training Qualifications UK's Appeals Policy, including time frames, can be found here.