Training Qualifications UK

TQUK Level 3 End-Point Assessment for ST0071 **Customer Service Specialist** V1.1

Qualification Number: 603/3830/1

Standard Specification

Contents

Key Information 3

Apprenticeship Summary 4

- Overview of the Role
- Occupation Summary
- Link to Professional Registration

Assessment Methods 5

- Assessment Order
- EPA Window
- Gateway Considerations

Observation with Q&A 6

- Planning the Observation
- Practical Observation
- Questioning Session
- Grading
- Practical observation with questions and answers - KSBs and Grading Criteria

Work-Based Project 14

- Work-Based Project Report Overview
- Work-Based Project Proposal
- Work-Based Project Report
- Interview
- Grading
- Work-based project - KSBs and Grading Criteria

Portfolio of Evidence 21

Professional Discussion 22

- Grading
- Professional Discussion - KSBs and Grading Criteria

Overall Grading 26

Resits and Retakes 26

Appeals 26

Key Information

Reference:	ST0071
Version:	V1.1
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:	222 March 2024
Lars code:	278
EQA provider:	Ofqual
Review:	This apprenticeship standard will be reviewed after a maximum of three years
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 questions and answers

Professional discussion supported by a portfolio of evidence

Work-based project, supported by an interview

Assessment Order

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.

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 must be given **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 the assessment of overall competence
- be carried out on a one-to-one basis.

Practical Observation

The End-Point Assessor must observe the apprentice undertaking a range of day-to-day workplace activities. The practical observation must, therefore, take place in the apprentice's workplace.

The practical observation should involve activities which allow the apprentice to demonstrate the full range of their knowledge, skills, and behaviours (KSBs) required.

The practical observation is covered in one session, lasting **60 minutes**, with a permitted 10% (+/-) variance.

During the practical observation, the apprentice should have 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.

Criteria that do not occur naturally during the practical observation will be tested during the question and answer part of this assessment. This will allow the apprentice to demonstrate their knowledge and give examples of their competency in these areas, enabling them to reach all grade boundaries.

The questioning period should not exceed 15% of the total time allowed for the practical observation. Therefore, the question and answer session will last up to **10 minutes**, following the 60-minute (+/-10%) practical observation.

Grading

This assessment is graded as fail, pass or distinction, 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.

Practical observation with questions and answers - KSBs and Grading Criteria

Knowledge	**Knowing your customers and their needs/Customer Insight**	
	What the apprentice must know	
	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 three 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	
	What the apprentice must know	
	Keep current knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you 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**	
	What the apprentice must know	
	Find solutions that meet your organisation's needs as well as the customer requirements	
	Pass	**Distinction**
	An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.	N/A
	Providing a positive customer experience	
	What the apprentice must know	
	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	
	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 a 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**	
	What the apprentice must know	
	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	
	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**	
	What the apprentice must know	
	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	
	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	
	What the apprentice must know	
	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 teamwork and collaboration with colleagues at all levels.	N/A
	Shows adaptability of own skills when working with internal customers.	
	Equality	
	What the apprentice must know	
	Adopt a positive and enthusiastic attitude, being open minded and able to tailor your service to each customer	
	Be adaptable and flexible to your 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	
	What the apprentice must know	
	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	
	Pass	**Distinction**
	Demonstrates brand advocacy, values and beliefs 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 apprentice must submit a written report on a project they have carried out. The project must meet the needs of the business and be relevant to their role. 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 a work-based project proposal submitted at 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 component. This will be discussed in the assessment planning meeting.

If the End-Point Assessor does not accept the apprentice's work-based project proposal, the apprentice will have one week to submit a reworked 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

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 write about it or complete their project report** until the project proposal has been approved.

The specific high-level challenge could be a complaint or difficult situation that the apprentice has dealt with. The apprentice will need to explain:

- what the complaint/situation they were involved in was
- 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
- what were the results.

The written report must be **2500 words** (+/- 10%), excluding annexes.

The work-based project report should contain annexes/appendices that are attributable to the apprentice and relevant to the actions they took in relation to the high-level challenge. Examples of evidence that could be included in the annexe/appendices are:

- emails
- letters
- meeting notes
- call logs
- workflow documents
- feedback.

Interview

An interview will support the work-based project report. This will take place at least two weeks after the apprentice submits the report to give the End-Point Assessor time to review their work and prepare for the interview.

The interview must take place in a controlled environment, free from any distractions. The interview can be conducted face to face or remotely via video conferencing using Microsoft Teams.

The interview will last for **60 minutes (+/-10%)** and will focus on the written project and supporting annexes. During the interview, the apprentice will be asked **10 competency-based questions**.

Grading

This assessment is graded as fail, pass or distinction, 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.

Work-based project - KSBs and Grading Criteria

Knowledge	**Business Knowledge and Understanding**	
	What the apprentice must know	
	Understand your organisation's current business strategy in relation to customers and make recommendations for its future	
	Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation	
	Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions	
	Pass	**Distinction**
	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.	Evidence to support their research and analysis of customer service standards and mission statements of other organisations to inform their recommendations.
	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.	Demonstrate the ability to consider the possible impact on their organisation of not considering the future in decision-making.
	Customer Journey knowledge	
	What the apprentice must know	
	Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience	
	Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation	
	Pass	**Distinction**
	Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.	N/A
	Demonstrates an understanding of the underpinning business processes that support them in bringing about the best outcome for customers and their organisation.	

<table>
<tr><td rowspan="8">Knowledge</td><td colspan="2">Customer service culture and environment awareness</td></tr>
<tr><td colspan="2">What the apprentice must know</td></tr>
<tr><td colspan="2">Understand your business environment and culture and the position of customer service within it</td></tr>
<tr><td colspan="2">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</td></tr>
<tr><td>Pass</td><td>Distinction</td></tr>
<tr><td>Demonstrates the ability to discuss the internal and external factors influencing their business environment and culture.</td><td rowspan="4">Demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation.</td></tr>
<tr><td>Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery.</td></tr>
<tr><td>Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.</td></tr>
<tr><td>Demonstrates the ability to identify potential causes of service failure and the consequences of these.</td></tr>
</table>

<table>
<tr><td rowspan="8">Skills</td><td colspan="2">Business-focused service delivery</td></tr>
<tr><td colspan="2">What the apprentice must know</td></tr>
<tr><td colspan="2">Demonstrate a continuous improvement and future-focused approach to customer service delivery, including decision making and providing recommendations or advice</td></tr>
<tr><td>Pass</td><td>Distinction</td></tr>
<tr><td>Evidences when they made decisions and recommendations to improve their own customer service delivery.</td><td>Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended alternative methods likely to improve results, stating reasons for choice.</td></tr>
<tr><td colspan="2">Providing a positive customer experience</td></tr>
<tr><td colspan="2">Standard</td></tr>
<tr><td colspan="2">Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction</td></tr>
<tr><td>Pass</td><td>Distinction</td></tr>
<tr><td>Provides evidence to show how they identify information which can be used by their organisation to provide customer insight and determine how this information can be analysed, used and presented.</td><td rowspan="2">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.</td></tr>
<tr><td>Demonstrates how they communicate with customers, gain full information on their experience, and recommend improvements to customer service delivery to others.</td></tr>
</table>

Skills		
	Working with your customers / customer insights	
	What the apprentice must know	
	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	
	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	
	What the apprentice must know	
	Analyse the end-to-end service experience, seeking input from others where required, supporting the 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	
	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, 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	
	Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.	Provides evidence to show when they analyse the risks and opportunities to implement change.

Portfolio of Evidence

To support the professional discussion, the apprentice must produce an on-programme portfolio of evidence.

Apprentices must submit the portfolio of evidence **two weeks** prior to the date of the professional discussion.

From the apprentice's 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.

The portfolio of evidence is not directly assessed.

The Portfolio Mapping and Tracking Form allows the apprentice to identify which piece of evidence meets each KSB.

Professional Discussion

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

The professional discussion will last for **60 minutes**, with a permitted 10% (+/-) variance. During the professional discussion, the End-Point Assessor may ask the apprentice follow-up questions that lead on from their initial question to test the apprentice's knowledge and skills further.

The apprentice may refer to their portfolio and to notes to help inform and validate their responses.

The professional discussion must take place in a controlled environment, free from any distractions. The professional discussion can be conducted face to face or remotely by video conferencing using Microsoft Teams.

Grading

This assessment is graded as fail, pass or distinction, 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.

Professional Discussion - KSBs and Grading Criteria

<table>
<tr><td rowspan="11">Knowledge</td><td colspan="3">Business Knowledge and Understanding</td></tr>
<tr><td colspan="3">What the apprentice must know</td></tr>
<tr><td colspan="3">Understand the impact their service provision has on the wider organisation and the value it adds</td></tr>
<tr><td colspan="3">Understand a range of leadership styles and apply them successfully in a customer service environment</td></tr>
<tr><td>Pass</td><td colspan="2">Distinction</td></tr>
<tr><td>Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments.</td><td colspan="2" rowspan="2">Evidences when they have analysed the importance of their professional image and its relationship with the organisation's brand.</td></tr>
<tr><td>Evidence of how they identify the different types of leadership styles that work best in their customer environment.</td></tr>
<tr><td colspan="3">Customer Journey knowledge</td></tr>
<tr><td colspan="3">What the apprentice must know</td></tr>
<tr><td colspan="3">Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention</td></tr>
<tr><td colspan="3">Understand commercial factors and authority limits for delivering the required customer experience</td></tr>
<tr><td colspan="2">Pass</td><td>Distinction</td></tr>
<tr><td colspan="2">Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.</td><td rowspan="2">N/A</td></tr>
<tr><td colspan="2">Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.</td></tr>
<tr><td colspan="3">Knowing your customers and their needs/Customer Insight</td></tr>
<tr><td colspan="3">What the apprentice must know</td></tr>
<tr><td colspan="3">Know your internal and external customers and how their behaviour may require different approaches from you</td></tr>
<tr><td colspan="3">Understand what drives loyalty, retention and satisfaction and how they impact on your organisation</td></tr>
<tr><td colspan="2">Pass</td><td>Distinction</td></tr>
<tr><td colspan="2">Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations.</td><td rowspan="2">N/A</td></tr>
<tr><td colspan="2">Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.</td></tr>
</table>

Knowledge	**Customer service culture and environment awareness**	
	What the apprentice must know	
	Understand how to find and use industry best practice to enhance your 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	**Business-focused service delivery**	
	What the apprentice must know	
	Resolve complex issues by being able to choose from and successfully apply a wide range of approaches	
	Pass	**Distinction**
	Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.	N/A
	Providing a positive customer experience	
	What the apprentice must know	
	Demonstrate a cost-conscious mindset when meeting customer and 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	
What the apprentice must know	
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	
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	
What the apprentice must know	
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

Team working	
What the apprentice must know	
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

The overall grades available for this apprenticeship are fail, pass, or distinction. Each assessment component is graded individually. Once an apprentice has completed all assessment components, the grades are combined as described in the table below to determine an apprentice's overall grade.

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

Resits and Retakes

If an apprentice fails any of the individual assessment components, they will be eligible for a resit or retake. Further development must be provided prior to a resit or retake. A retake requires the apprentice to undertake further learning and therefore they would need to go through the gateway process again.

An apprentice cannot retake or resit any part of the EPA to increase their grade from a pass to a distinction. If a resit or retake is required, the overall EPA grade will be capped at a pass, unless Training Qualifications UK determines there are exceptional circumstances.

If a retake or resit is required, the apprentice should complete this within **12 months**. There is no limit to the number of retake or resits within the 12 months.

If the apprentice fails the work-based project, they will be asked to rework their project, taking into account the feedback from the assessor. The apprentice will have **one month** to rework their submission. The apprentice will be able to submit previous evidence along with the new additional evidence.

Appeals

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