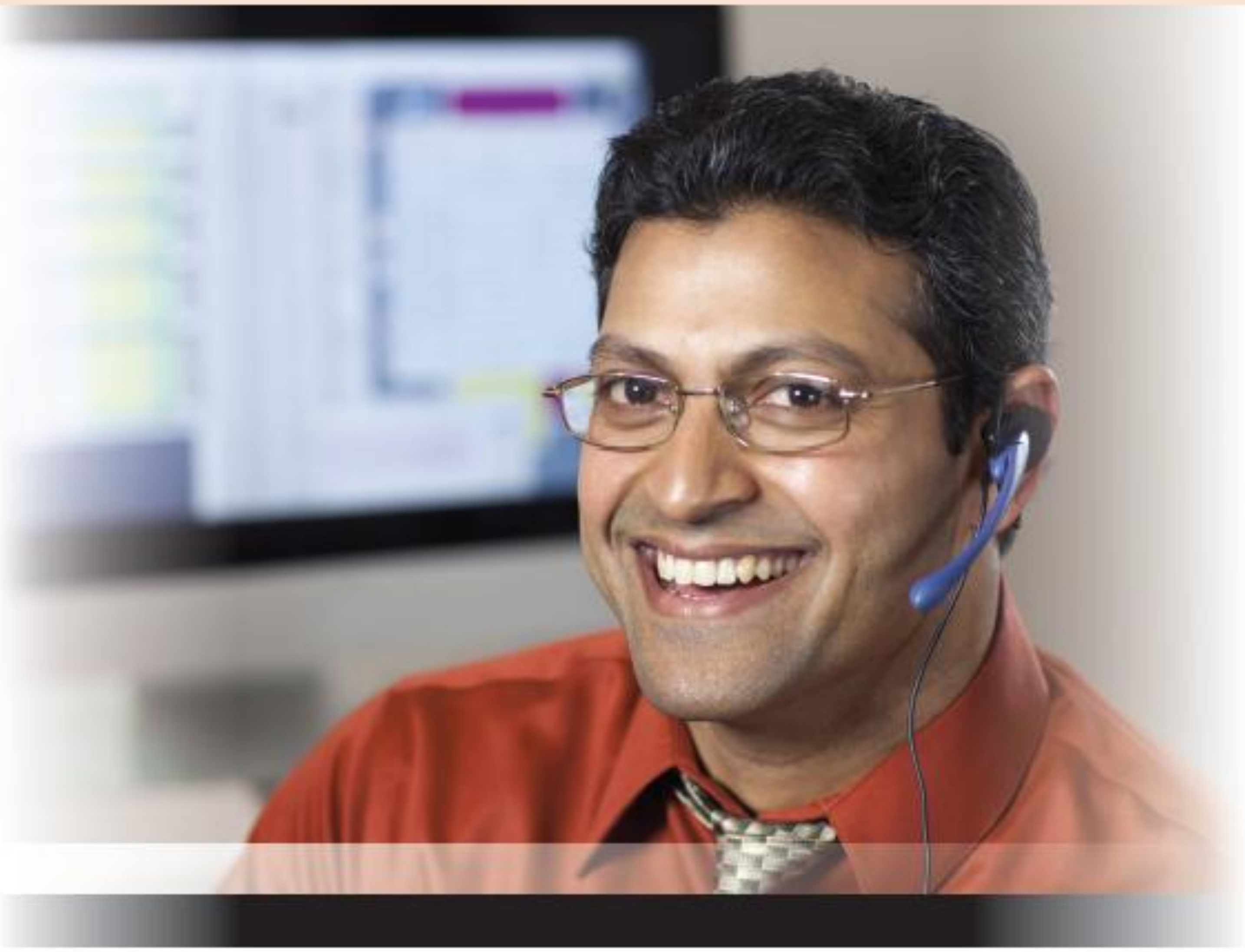
Highfield

Highfield Level 3 End-Point Assessment for ST0071 Customer Service Specialist

End-Point Assessment Kit



Highfield Level 3 End-Point Assessment for ST0071 Customer Service Specialist

EPA Kit

Contents

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How to use this EPA Kit

Welcome to the Highfield End-Point Assessment Kit for the Customer Service Specialist apprenticeship standard.

Highfield is an independent end-point assessment organisation that have been approved to offer and carry out the independent end-point assessments for the Level 3 Customer Service Specialist apprenticeship standard. Highfield internally quality assure all end-point assessments in accordance with their IQA process, and additionally, all end-point assessments are externally quality assured by the relevant EQA organisation.

The EPA kit is designed to outline all you need to know about the end-point assessments for this standard and will also provide an overview of the on-programme delivery requirements. In addition**,** advice and guidance for trainers on how to prepare apprentices for the end-point assessment is included. The approaches suggested are not the only way in which an apprentice may be prepared for their assessments, but trainers may find them helpful as a starting point.

Highfield also offer the Highfield Customer Service Specialist Apprenti-kit that is a comprehensive learning resource, which is designed to be used on-programme.

For more information, please go to the Highfield Products website. Please note that the use of this kit is not a prerequisite for apprentices undertaking the customer service specialist end-point assessment.

Key facts

Apprenticeship standard:	Customer Service Specialist
Level:	3
On-programme duration:	Typically 15 months
End-Point assessment window:	3 months
Grading:	Pass/distinction
End-point assessment methods:	Practical observation (with Q&As) Work-based project (supported by an interview) Professional discussion (supported by portfolio of evidence)

In this kit, you will find:

- an overview of the standard and any on-programme requirements
- a section focused on delivery, where the standard and assessment criteria are presented in a suggested format that is suitable for delivery
- guidance on how to prepare the apprentice for gateway
- detailed information on which part of the standard is assessed by which assessment method
- suggestions on how to prepare the apprentice for each part of the end-point assessment
- a section focused on the end-point assessment method where the assessment criteria are presented in a format suitable for carrying out 'mock' assessments

Introduction

Standard 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 customers' 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 environments including contact centres, retail, webchat, service industry or any customer service point.

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.

On-programme requirements

The period of learning, development and continuous assessment is managed by the employer, in most cases with the 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. The whole programme will be typically completed in 15 months.

To drive quality and consistency through on-programme learning, employers may wish to consider the following:

- use their normal performance management processes to monitor the progress of the apprentice, provide feedback and guide development.
- provide support, ensuring the requirements of the apprenticeship standard are reflected in the above processes and by filling any gaps through their work with apprentices.
- carry out joint reviews of progress at regular intervals, involving apprentices, line managers and others with a direct relationship, for example, mentors and workplace coaches. They should agree on how any issues are to be resolved together.
- allow apprentices to develop and maintain, within a portfolio, examples of their work throughout their apprenticeship that cover the full standard. This portfolio will be used by the apprentice to demonstrate to the employer that they are ready for the end-point assessment. Some of the evidence from this portfolio, which has

not been assessed by the independent assessor, will be used to support the professional discussion.

The training programme leading to end-point assessment should cover the breadth and depth of the standard using suggested on-programme assessment methods that integrate the knowledge, skills and behaviour components, and which ensure that the apprentice is sufficiently prepared to undertake the end-point assessment. Training, development and ongoing review activities should include:

- achievement of level 2 English and maths. If the apprentice began their apprenticeship training before their 19th birthday, they will still be subject to the mandatory requirement to study towards and achieve English and maths. The requirements for English and maths are optional for apprentices aged 19+ at the start of their apprenticeship training.

Portfolio of evidence

The apprentice must compile a portfolio of evidence during their time on-programme that is mapped against the knowledge, skills and behaviours assessed in the professional discussion underpinned by a portfolio of evidence.

The evidence will consist of a minimum of **10 pieces of evidence** to a maximum of **15 pieces**. Evidence sources for the portfolio may include:

- witness statements
- customer feedback such as emails or letters
- manager feedback from one-to-one or alike

The portfolio must be accompanied by a Portfolio Matrix. This can be downloaded from our website. The Portfolio Matrix must be fully completed, including a declaration by the apprentice to confirm that the portfolio is valid and attributable to the apprentice.

Apprentices must submit the requested portfolio of evidence to Highfield 2 weeks prior to the professional discussion date. This date will be agreed when the apprentice passes through the gateway process. It is not directly assessed but underpins the professional discussion.

Project proposal

Once the apprentice has identified the high-level challenge they want to write about in the project report, they should arrange a discussion with their employer/training provider. The employer/training provider should then determine whether the proposed project has the potential to meet the criteria of the work-based project report.

If the employer/training provider deems the proposed project is suitable, the apprentice should then write a project proposal and submit this to Highfield. Highfield recommend this proposal should be 200-300 words. The proposal **must** be made available to Highfield Assessment at gateway.

The end-point assessor will review the proposal. The apprentice should **only** start writing their project report once the proposal has been approved by the end-point assessor. If for any reason the proposal is not approved, the apprentice must resubmit a revised proposal within 1 week.

Use of artificial intelligence (AI) in the EPA

Where AI has been used as part of the apprentice's day-to-day work and forms part of a project report, presentation, or artefact, it should be referenced as such within the work. AI must not be used to produce the report or portfolio.

Where AI has been used as part of a portfolio that underpins an interview or professional discussion or any other assessment method, it should be fully referenced within the portfolio.

Additional, relevant on-programme qualification

There are no mandatory qualifications for apprentices for this standard. Employers may wish to choose the Highfield Level 3 Diploma in Customer Service Skills (RQF) to help structure the on-programme delivery.

Readiness for end-point assessment

For an apprentice to be ready for the end-point assessments:

- the apprentice must have achieved level 2 English and maths. The requirements for English and maths are mandatory for all apprentices aged between 16-18 at the start of their apprenticeship training. The requirements for English and maths are optional for apprentices aged 19+ at the start of their apprenticeship training.
- the apprentice must have gathered a portfolio of evidence to be put forward as a basis for the professional discussion underpinned by a portfolio of evidence.
- a proposal form will be completed by the apprentice and submitted to Highfield at gateway where they will set out what the subject of their project report will be. This will only be signed off by the assessor if it is deemed appropriate enough to satisfy the criteria available.
- the employer must be confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard along with evidence that the apprentice holds a portfolio to evidence this. The employer, along with the training provider, will decide if the full portfolio meets the requirements of the standard.

- the employer must also be satisfied that the apprentice is working at or above the level set out in the standard. To ensure this, the apprentice must attend a formal meeting with their employer to complete the Gateway Readiness Report.
- the apprentice and the employer should then engage with Highfield to agree a plan and schedule for each assessment activity to ensure all components can be completed within a 3-month end-assessment window (the work-based project must be completed within 2 months from the start of the end-point assessment). Further information about the gateway process is covered later in this guide.

If you have any queries regarding the gateway requirements, please contact your EPA Customer Engagement Manager at Highfield Assessment.

Order of end-point assessments

The assessment plan recommends that the work-based project is the first assessment, followed by the professional discussion and then finally the practical observation.

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The Highfield approach

This section describes the approach Highfield has adopted in the development of this end-point assessment in terms of its interpretation of the requirements of the end-point assessment plan and other relevant documents.

Documents used in developing this end-point assessment

Standard (2020)

https://www.instituteforapprenticeships.org/apprenticeship-standards/customer-service-specialist-v1-1

End-point assessment plan (11th December 2020)

https://www.instituteforapprenticeships.org/media/bavjgzhs/st0071_customer_service_specialist_l3_v11_epa_for_publication.pdf

Specific considerations

All of the evidence criteria used within this end-point assessment have been taken directly from the customer service specialist assessment plan.

Practical observation

Where it states on page 5 of the assessment plan that the practical observation will take place in the apprentice's normal place of work, clarification has been provided by Ofqual that the observation assessment may also take place remotely over web conferencing. This may be where the apprentice is working in a desk-based role remotely, or where the assessor does not have access to the workplace. The following requirements will apply in these cases:

Remote desk-based observation

- Connected device with camera and microphone
- Facility to share screen and audio via web conferencing (Microsoft Teams)
- Facility to show two-way interaction with customers – either through onscreen chat or a phone system
- Private room where you will not be disturbed

Remote non-desk-based observation

- A connected device with a forward-facing camera and earphones/microphone
- Reliable internet connection throughout the environment where the observation is taking place
- A representative from the workplace who can act as a camera person

Work-based project

On page 6 of the customer service specialist assessment plan, it states that 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. To ensure a standardised approach, Highfield recommend that the word count for the project proposal is 200-300 words.

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Gateway

How to prepare for gateway

After apprentices have completed their on-programme learning, they should be ready to pass through 'gateway' to their end-point assessment.

Gateway is a meeting that should be arranged between the apprentice, their employer and training provider to determine that the apprentice is ready to undertake their end-point assessment. The apprentice should prepare for this meeting by bringing along work-based evidence, including:

- emails
- letters
- meeting notes
- call logs
- workflow documents
- feedback
- performance review meeting information
- work-based proposal form

As well as evidence from others, such as:

- mid and end-of-year performance reviews
- feedback to show how they have met the apprenticeship standards while on-programme

In advance of gateway, apprentices will need to have completed the following. The requirements for English and maths listed below are mandatory for all apprentices aged between 16-18 at the start of their apprenticeship training. The requirements for English and maths listed below are optional for apprentices aged 19+ at the start of their apprenticeship training.

- Achieved level 2 English
- Achieved level 2 maths
- Completed their project proposal

Apprentices should be advised by employers and providers to gather this evidence throughout their on-programme training. It is recommended that employers and providers complete regular checks and reviews of this evidence to ensure the apprentice is progressing and achieving the standards before the formal gateway meeting is arranged.

The gateway meeting

The gateway meeting should last around 1 hour and must be completed on or after the apprenticeship on-programme end date. It should be attended by the apprentice and the relevant people who have worked with the apprentice on-programme, such as the line manager/employer or mentor, the on-programme trainer/training provider and/or a senior manager (as appropriate to the business).

During the meeting, the apprentice, employer and training provider will discuss the apprentice's progress to date and confirm if the apprentice has met the full criteria of the apprenticeship standard during their on-programme training. The Gateway Readiness Report should be used to log the outcomes of the meeting and should be agreed by all 3 parties. This report is available to download from the Highfield Assessment website.

The report should then be submitted to Highfield to initiate the end-point assessment process. If you require any support completing the Gateway Readiness Report, please contact your EPA Customer Engagement Manager at Highfield Assessment.

Please note: a copy of the standard should be available to all attendees during the gateway meeting.

Reasonable adjustments and special considerations
Highfield Assessment has measures in place for apprentices who require additional support. Please refer to the Highfield Assessment Reasonable Adjustments Policy for further information/guidance.

ID requirements
Highfield Assessment will need to ensure that the person undertaking an assessment is indeed the person they are claiming to be. All employers are therefore required to ensure that each apprentice has their identification with them on the day of the assessment so the end-point assessor can check.

Highfield Assessment will accept the following as proof of an apprentice's identity:

- a valid passport (any nationality)
- a signed UK photocard driving licence
- a valid warrant card issued by HM forces or the police
- another photographic ID card, such as an employee ID card or travel card

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The Customer Service Specialist apprenticeship standard

Below are the knowledge, skills and behaviours (KSBs) from the standard and related assessment criteria from the assessment plan. On-programme learning will be based upon the KSBs and the associated assessment criteria are used to assess and grade the apprentice within each assessment method.

<table>
<tr><th colspan="2">Business knowledge and understanding</th></tr>
<tr><th colspan="2">Knowledge</th></tr>
<tr><td colspan="2">Understand your organisation’s current business strategy in relation to customers and make recommendation for its future</td></tr>
<tr><td colspan="2">Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation</td></tr>
<tr><td colspan="2">Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions</td></tr>
<tr><th colspan="2">Work-based project (supported by an interview)</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>K1.1 Evidences that they understand the impact of the organisation’s mission statement and business strategy on customer service delivery and makes recommendations for future improvements
K1.2 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 role</td><td>K1.3 Evidence to support their research and analysis of customer service standards and mission statements of other organisations in comparison to their own organisation’s to inform their recommendations

K1.4 Ability to consider the possible impact on their organisation of not considering the future in decision-making</td></tr>
<tr><th colspan="2">Knowledge</th></tr>
<tr><td colspan="2">Understand the impact your service provision has on the wider organisation and the value it adds</td></tr>
<tr><td colspan="2">Understand a range of leadership styles and apply them successfully in a customer service environment</td></tr>
</table>

Professional discussion (supported by portfolio evidence)	
Pass criteria	**Distinction criteria**
K1.5 Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments **K1.6** Evidence of how they identify the different types of **leadership styles** that work best in their customer environment	*There are no distinction criteria for this component*
Amplification and guidance	

- **Business strategy** refers to how a business plans to achieve its goals, how it improves and sustains its position within the industry.

- **Mission statement** refers to the short statement of an organisation's purpose that identifies the goal of its operations.

- **Leadership styles** refer to the approach, behaviour and methods that a leader uses to guide, motivate and manage a team or organisation. It encompasses how leaders make decisions, communicate with their team, handle conflict and influence others.
    - Examples of leadership styles may include:
        - transformational
        - transactional
        - servant
        - autocratic
        - democratic
        - bureaucratic

Customer journey knowledge	
Knowledge	
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	
Work-based project (supported by an interview)	
Pass criteria	**Distinction criteria**
K2.1 Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes **K2.2** An understanding of the **underpinning business processes** that support them on bringing about the best outcome for customer and their organisation	*There are no distinction criteria for this component*
Knowledge	
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	
Professional discussion (supported by portfolio evidence)	
Pass criteria	**Distinction criteria**
K2.3 Understanding of why customer issues and complex situations sometimes need referral or escalation for **specialist attention** within their organisation **K2.4** Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the **limit of their authority** when providing customer service	*There are no distinction criteria for this component*

Amplification and guidance
Journeys of your customers: - analyse and interpret the customer roadmap and the journey that the customer has taken to get from the start to the finish, including timelines and relevant stakeholders   - objections and obstacles that are identified along the way   - businesses use the customer journey analysis to understand the customer's experience with aim of optimising the experience for the customer   - create a customer journey map   **Underpinning business processes** may include: - complaint handling policy/procedure   - customer management systems   - feedback processes   - incentives   - penalties   **Specialist attention** refers to the contractual obligations or service-level agreements (SLAs) that ensure customer requests for service are met: - this may also be what the customer requires if an issue cannot be resolved at the first line of customer service   **Limit of their authority** refers to the decisions that certain staff members can make in a business: - this includes exchanges and refunds   - in certain situations, a staff member must confer with a higher level of authority before making a decision

<table>
<tr><th colspan="2">Knowing your customers and their needs/customer insight</th></tr>
<tr><th colspan="2">Knowledge</th></tr>
<tr><td colspan="2">Know your internal and external customers and how their behaviour may require different approaches from you</td></tr>
<tr><td colspan="2">Understand what drives loyalty, retention and satisfaction and how they impact on your organisation</td></tr>
<tr><th colspan="2">Professional discussion (supported by portfolio evidence)</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>K3.1 Evidences knowledge of how their internal and external customers’ expectations can differ and how they would adapt their approach to meet those expectations
K3.2 Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation</td><td>K3.3 Evidences when they have analysed the importance of their professional image and its relationship with the organisation’s brand</td></tr>
<tr><th colspan="2">Knowledge</th></tr>
<tr><td colspan="2">How to analyse, use and present a range of information to provide customer insight</td></tr>
<tr><td colspan="2">Understand different customer types and the role of emotions in bringing about a successful outcome</td></tr>
<tr><td colspan="2">Understand how customer expectations can differ between cultures, ages and social profiles</td></tr>
<tr><th colspan="2">Practical observation (including Q&A)</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>K3.4 Demonstrates how they analyse, use and present a range of information in order to provide customer insight
K3.5 An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them
K3.6 Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types</td><td>There are no distinction criteria for this component</td></tr>
</table>

K3.7	Evidences knowledge of how **customer expectations** can differ between cultures, ages and social profiles	

Amplification and guidance
• **Customer types** may include: ○ internal ○ external ○ business/corporate ○ domestic ○ vulnerable • **Customer expectations:** ○ analyse the current demographics of customers and how they can be met. Shows that this can be done within a relevant timescale ○ make use of a relevant forum

Customer service culture and environment awareness	
Knowledge	
Understand how to find and use **industry best practice** to enhance own knowledge	
Professional discussion (supported by portfolio evidence)	
Pass criteria	**Distinction criteria**
K4.1 Evidences knowledge of where different sources of information on **industry best practice** can be found and used to improve personal and professional development	*There are no distinction criteria for this component*
Knowledge	
Keep current knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers	
Practical observation (including Q&A)	
Pass criteria	**Distinction criteria**
K4.2 Demonstrates an understanding of **current legislation, compliance and regulatory guidance** and their impact on customer service delivery	*There are no distinction criteria for this component*
Knowledge	
Understand your business environment and culture and the position of customer service within it	
Understand your organisation's structure, what role each department needs to play in delivering customer service and what the consequences are should things go wrong	
Work-based project (supported by an interview)	
Pass criteria	**Distinction criteria**
K4.3 Ability to discuss the internal and external factors influencing their business environment and culture **K4.4** Evidences knowledge of the **departmental roles/functions** within their organisational structure and their influence in customer service delivery	***K4.7*** *Ability to demonstrate the importance of assessing the* ***political, economic, social, technical, legal and environmental factors*** *that influence the operation of their organisation*

K4.5	Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service	
K4.6	Ability to identify potential causes of **service failure** and the consequences of these	

Amplification and guidance

- **Industry best practices** provide better understanding, enabling to provide a better customer service through in-depth knowledge
  - Best practice knowledge within an industry may include:
    - company's internal Intranet/knowledge portal/SharePoint
    - training - initial and refresher
    - briefings
    - toolbox talks
    - posters
    - online group chats
    - recognised industry bodies and regulators, for example:
      - British Standards Institute (BSI) is the UK national member of the standards bodies
      - International organisation for standardisation (ISO), International Electrotechnical commission (IEC), European Committee for Standardisation (CEN), European Committee for Electrotechnical Standardisation (CENELEC) and European Telecommunications Standards Institute (ETSI) enable UK influence
      - UK regulated professions and their regulators
  - Sharing best practices improves personal and professional development and can be tracked through:
    - Continuous Development Plan (CPD)
    - Personal Development Plan (PDP)
    - Learning logs
    - SMART objectives
    - Collaboration tools/knowledge portals/SharePoint/LinkedIn
    - Industry thinks tanks

- **Current legislation, compliance and regulatory guidance** may include:
  - Consumer Rights Act
  - Consumer Protection Act
  - Trade Description Act
  - Workers Protection (Amendment of Equality Act) Act
  - General Data Protection Regulation (GDPR)
  - Health and Safety at Work etc. Act (HASAWA)
  - The Management of Health and Safety at Work Regulations
  - Health, Safety and Welfare (HSW)
  - May also be relevant to roles and responsibilities and covered through health and safety:
    - Manual handling
    - Control of Substances Hazardous to Health (COSHH)
    - Working at Height Regulations
    - Slips, trips and falls

- **Departmental roles/functions**
  - HR
  - Board of Directors/Management team
  - Supervisory team
  - Customer delivery team
  - Complaints department/customer resolution team
  - Warehouses/depot
  - Goods in/out
  - IT
  - Finance/Accounting
  - Reception

- **Service failures**

- IT system failures
- Production line failures
- Lack of resources/staff
- External factors
- Human factors
- Communication breakdown
- Lack of knowledge
- Lack of training
- Weather
- Industry strikes

- **Political, economic, social, technical, legal and environmental factors** (PESTLE) analysis may include:
    - political - external forces driven by the government:
        - politics and political movements
        - rules
        - regulations
        - new legislations and legislation changes
        - taxes
        - wars and conflicts
        - trade agreements
    - economic - external forces driven by the economy:
        - employment rates
        - inflations
        - currency devaluation
        - stock market and market values
    - social - external social dynamics:
        - demographic changes
        - religious beliefs

- consumer opinions
    - purchasing patterns
    - media
  - technology - external forces driven by technology:
    - use of artificial intelligence (AI)
    - energy usage
    - cloud software
    - internet
    - technology usage
    - new technology or equipment
  - legal - external forces driven by law:
    - patent and intellectual rights laws
    - protection laws
    - occupational safety laws
    - import export laws/Brexit
    - licences
  - environmental - external forces driven by the environment:
    - climate change
    - consumption of non-renewable resources
    - energy alternatives
    - gas emissions
    - natural disasters
    - environmental hazards

Business-focused service delivery	
Skills	
Find solutions that meet your organisation's needs as well as the customer requirements	
Practical observation (including Q&A)	
Pass criteria	**Distinction criteria**
S1.1 An ability to assess situations and offer clear explanations, options and solutions that **balance customer and organisational requirements**	***S1.2*** *Demonstrates own* ***communication with customers*** *that ensures the best solution to meet customer requirements and organisational needs*
Skills	
Demonstrate a continuous improvement and future-focused approach to customer service delivery including decision-making and providing recommendations or advice	
Work-based project (supported by an interview)	
Pass criteria	**Distinction criteria**
S1.3 Evidence when they made decisions and recommendations to improve their own customer service delivery	***S1.4*** *Evidence when they evaluated the strengths and weaknesses of* ***feedback methods*** *used and recommended alternative methods likely to improve results, stating reasons for choice*
Skills	
Resolve complex issues by being able to choose from and successfully apply a wide range of approaches	
Professional discussion (supported by portfolio evidence)	
Pass criteria	**Distinction criteria**
S1.5 Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout	*There are no distinction criteria for this component*
Amplification and guidance	
• **Balance customer and organisational requirements**: ○ accessing relevant information/company guidelines ○ regulations and legislations	

    - compliance and rules
    - available resources
    - level of authority
    - any tools or methods
    - strengths and weaknesses of assessment methods
    - customer needs analysis
    - stakeholder management and analysis

- **Communicate with customers** may include:
    - face-to-face
    - verbal
    - body language
    - emails
    - letters
    - phones

- **Feedback methods** used within the organisation may include:
    - Trustpilot
    - Emails
    - Face-to-face
    - Organisation's own system or processes
    - Feedback boxes
    - Surveys
    - Social media

- **Resolve complex issues** may include:
    - problem identification and escalation

- root cause analysis
- impact assessment (people, process and technology)
- risk assessment (impact versus likelihood)
- emotional intelligence
- active listening
- conflict resolution
- influencing and negotiating
- listen, apologise, solve and thank (LAST)
- listen, empathise, ask/apologise, reassure/resolve and nurture (LEARN)

Providing a positive customer experience	
Skills	
Demonstrate a **cost-conscious mindset** when meeting customer and the business needs	
Professional discussion (supported by portfolio evidence)	
Pass criteria	**Distinction criteria**
S2.1 Demonstrates when they have balanced the meeting of their customer, and their organisations needs while showing they have considered cost implications	*There are no distinction criteria for this component*
Skills	
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 positive customer outcome in the relevant format	
Practical observation (including Q&A)	
Pass criteria	**Distinction criteria**
S2.2 Demonstrates through **advanced questioning**, **listening and summarising**, the negotiation of mutually beneficial outcomes **S2.3** Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction **S2.4** Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic	***S2.7*** *Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement*

commitments and delivering on them in line with organisational policy and procedures **S2.5** Recognises when customer emotions have been affected by the level of service offered **S2.6** Demonstrates how they **adapt their communication style** to clearly and concisely communicate complex information to customers to support positive outcomes	

Skills	
Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction	
Work-based project (supported by an interview)	
Pass criteria	**Distinction criteria**
S2.8 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** **S2.9** Demonstrates how they communicate with customers, gaining full information on their experience and recommend improvements to customer service delivery to others	***S2.10*** *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* ***S2.11*** *Provides evidence to show when they analyse the risks and opportunities to implementing change*
Amplification and guidance	

- **Cost-conscious mindset** refers to using metrics such as customer satisfaction, retention and complaints to understand the impact of customer service on business outcomes.

- **Advanced questioning** refers to the process of asking thoughtful, open-ended questions that encourage customers to provide detailed and meaningful responses. This goes beyond basic queries and aims to uncover underlying needs, concerns or motivations that may not be immediately apparent.

- **Listening and summarising**:

- effective listening is the process of actively and attentively hearing and understanding what others are saying to ensure responses are thoughtful.
  - summarising ensures that you accurately capture and reflect the main points the customer has shared, confirming that you've understood them correctly.
  - examples of listening and summarising may include:
    - active listening - using verbal and non-verbal cues to show that you are engaged in the conversation
    - summarising - after the customer explains their issue, you might summarise their points to confirm your understanding
    - paraphrasing - rephrasing the customer's statements in your own words to ensure clarity and confirm understanding

- **Manage challenging and complicated situations** may include:
  - stay calm and professional
  - understand the problem
  - importance of emotional intelligence
  - use effective communication
  - problem-solving and decision-making
  - consider customer's emotions and the effect on customers
  - negotiate solutions
  - consider compliance and organisational guidelines
  - escalate when necessary
  - learn from experience
  - negotiating and influencing
  - listen, apologise, solve and thank (LAST)
  - listen, empathise, ask/apologise, reassure/resolve and nurture (LEARN)

- **Provide options and solutions** refers to the problem-solving skills used to help provide solutions and options for customers.
  - Examples of problem-solving strategies may include:
    - root cause analysis
    - hear, empathise, apologies and take ownership (HEAT)

        - the 5 Why approach - a technique that helps identify the root cause of an issue by asking ‘why’ 5 times
        - work backwards - start with the final solution and work backwards to the beginning
        - 4 strategies of problem-solving - use questioning to generate ideas and solutions to solve a problem, identify these solutions, evaluate the solutions and select the most appropriate or effective option. Finally, select the solution best suited to the problem through evaluation and analysis.

- **Use written and verbal communication to simplify and provide complex information** may include:
    - understand the audience
    - identify key messages
    - identify options for communication channels, media and platforms
    - the 5 ‘Cs of communication - clear, correct, concise, complete and compassionate

- **Adapt their communication style** refers to suit situations and resolve complex issues to ensure to support customers' needs and expectations in a supportive manner. This may include:
    - verbal
    - face-to-face
    - tone of voice
    - body language
    - written communication
    - empathy
    - emotional intelligence

- **Explore and interpret the customer experience** may include:
    - market research
    - customer feedback, reviews and testimonials
    - customer churn, retention and attrition

- **Information can be analysed, used and presented** may include:

- to gain information:
  - surveys
  - different types of feedback
  - emails
- to analyse:
  - charts
  - spreadsheets
  - strengths, weaknesses, opportunities and threats (SWOT) analysis
- use the information:
  - look at trends, weaknesses, strength to enhance, services and customers' needs and expectations
- to present to the organisation:
  - charts
  - slide presentations
  - spreadsheets

<table>
<tr><th colspan="2">Working with your customers/customer insights</th></tr>
<tr><th colspan="2">Skills</th></tr>
<tr><td colspan="2">Proactively gather customer feedback through a variety of methods. Critically analyse and evaluate the meaning, implications and facts and act upon it</td></tr>
<tr><td colspan="2">Analyse your customer types to identify or anticipate their potential needs and expectations when providing your service</td></tr>
<tr><th colspan="2">Work-based project (supported by an interview)</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>S3.1 Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements
S3.2 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</td><td>S3.3 Demonstrates how knowing their customer and their needs has a direct impact on:
a. Their working practices
b. Organisational policy/procedures
S3.4 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</td></tr>
<tr><th colspan="2">Amplification and guidance</th></tr>
<tr><td colspan="2">• Customer feedback and how to proactively gather this may include:
o direct customer surveys
o interviews
o focus groups
o customer feedback forms
o social media monitoring
o during interactions
o email and SMS feedback requests
o customer panels
o online reviews and testimonials, for example, Trustpilot and Google</td></tr>
</table>

- **Customer types**:
  - internal customers
  - external customers
  - new versus returning customers
  - high-value customers
  - dissatisfied or upset customers
  - demanding or high-expectation customers
  - customers with specific needs

<table>
<tr><th colspan="2">Customer service performance</th></tr>
<tr><th colspan="2">Skills</th></tr>
<tr><td colspan="2">Maintain a positive relationship, even when you are unable to deliver the customers expected outcome</td></tr>
<tr><td colspan="2">When managing referrals or escalations, take into account historical interactions and challenges to determine next steps</td></tr>
<tr><th colspan="2">Practical observation (including Q&A)</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>S4.1 Evidences when they have maintained a positive relationship, even when they are unable to deliver the customers expected outcome
S4.2 Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps when managing referrals and escalations</td><td>There are no distinction criteria for this component</td></tr>
<tr><th colspan="2">Amplification and guidance</th></tr>
<tr><td colspan="2">

Maintain a positive relationship may include:

clear and honest communication
show empathy and understanding
positive behaviour and attitude
offer alternative or solutions
stay professional and calm
demonstrate good body language
follow-up and continued support
focus on long-term relationship

Historical interactions and challenges to determine next steps may include:

reviewing past interactions:
look at customer’s history such as previous complaints, service requests or ongoing issues

</td></tr>
</table>

        - help identify patterns and tailor responses
    - understanding previous challenges:
        - consider any challenges the customer has faced in previous interactions, such as delays, misunderstanding or resolved issues
        - acknowledge challenges demonstrates an awareness of the customer's concern and committed to resolving issues
    - tailoring the approach:
        - such as adjusting communication styles and offering a more personalised approach
    - take ownership and responsibility
    - escalating to the relevant teams or departments
    - preventing recurrence of issues by addressing the root cause of the problem
    - documenting and sharing insights:
        - identify and share steps taken to help improve future service

<table>
<tr><th colspan="2">Service improvement</th></tr>
<tr><th colspan="2">Skills</th></tr>
<tr><td colspan="2">Analyse the end-to-end service experience, seeking input from others where required supporting development of solutions</td></tr>
<tr><td colspan="2">Make recommendations based on your findings to enable improvement</td></tr>
<tr><td colspan="2">Make recommendations and implement, where possible, changes in line with new and relevant legislation, regulations and industry best practice</td></tr>
<tr><th colspan="2">Work-based project (supported by an interview)</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>S5.1 Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers
S5.2 Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required
S5.3 Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change</td><td>S5.4 Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s)</td></tr>
<tr><th colspan="2">Amplification and guidance</th></tr>
<tr><td colspan="2">• Qualitative and quantitative customer experience data:
○ contract lifecycle, value, invoice and payment terms, contract time and resolution rates, number and types of plaudits and complaints
○ examples of collating and using information to aid decision-making, actions taken and results
○ recognises areas where improvements can be made and provides options or recommendations of how improvements can be implemented
○ knowledge of relevant legislation, regulatory guidance and its impact on decision-making</td></tr>
</table>

<table>
<tr><th colspan="2">Develop self</th></tr>
<tr><th colspan="2">Behaviour</th></tr>
<tr><td colspan="2">Proactively keep your service, industry and best practice knowledge and skills up to date</td></tr>
<tr><td colspan="2">Consider personal goals related to service and take action towards achieving them</td></tr>
<tr><th colspan="2">Professional discussion (supported by portfolio evidence)</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>B1.1 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</td><td>B1.2 Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach</td></tr>
<tr><th colspan="2">Amplification and guidance</th></tr>
<tr><td colspan="2">Learning and development goals:
reaching performance standards and acquiring new knowledge or skills
e-learning, workbooks, training, coaching or mentoring
explanation of specific, measurable achievable, relevant and time-bound (SMART) objectives and where they have been applied in their personal development plan
Future-focused approach refers to identifying the factors that might influence future customer service strategy or activities.
This may include:
completing a strengths, weaknesses, opportunities and threats (SWOT) analysis
completing a political, economic, sociological, technological, legal and environmental (PESTLE) analysis</td></tr>
</table>

Ownership/responsibility	
Behaviour	
Make realistic promises and deliver on them	
Professional discussion (supported by portfolio evidence)	
Pass criteria	**Distinction criteria**
B2.1 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	*There are no distinction criteria for this component*
Behaviour	
Personally commit to and take ownership of actions to resolve customer issues to the satisfaction of the customer and your organisation	
Exercise proactivity and creativity when identifying solutions to customer and organisational issues	
Practical observation (including Q&A)	
Pass criteria	**Distinction criteria**
B2.2 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 **B2.3** Shows proactivity and creativity when identifying solutions to customer and organisational issues	*There are no distinction criteria for this component*
Amplification and guidance	
• **Appropriate communication techniques**: ○ range of communication methods:	

    - verbal
    - non-verbal
    - telephone
    - email
    - social media
    - letters
  - use of effective communication in reducing conflict:
    - remaining calm
    - demonstrating empathy

<table>
<tr><th colspan="2">Teamworking</th></tr>
<tr><td colspan="2">Behaviour</td></tr>
<tr><td colspan="2">Share knowledge and experience with others to support colleague development</td></tr>
<tr><td colspan="2">Professional discussion (supported by portfolio evidence)</td></tr>
<tr><td>Pass criteria</td><td>Distinction criteria</td></tr>
<tr><td>B3.1 Demonstrate sharing own knowledge and experience with others, to support colleague development</td><td>B3.2 Evidences when they have assessed the impact of sharing their own knowledge on:
a. Their development
b. Colleague development</td></tr>
<tr><td colspan="2">Behaviour</td></tr>
<tr><td colspan="2">Work effectively and collaboratively with colleagues at all levels to achieve results</td></tr>
<tr><td colspan="2">Recognise colleagues as internal customers</td></tr>
<tr><td colspan="2">Practical observation (including Q&A)</td></tr>
<tr><td>Pass criteria</td><td>Distinction criteria</td></tr>
<tr><td>B3.3 Demonstrates achievement of results through effective teamwork and collaboration with colleagues at all levels
B3.4 Shows adaptability of own skills when working with internal customers</td><td>There are no distinction criteria for this component</td></tr>
<tr><td colspan="2">Amplification and guidance</td></tr>
<tr><td colspan="2">• Support colleague development may include:
○ understanding colleague needs
○ providing guidance and mentorship
○ share own knowledge or experience
○ encouraging learning and development</td></tr>
</table>

- providing constructive feedback
- promoting a positive team environment
- awareness and the importance of equality, diversity and inclusion
- sharing best practices
- one-to-one support

- **Work effectively and collaboratively with colleagues.** Benefits of this to achieve results may include:
  - enhanced problem-solving
  - increased achievement of key performance indicators (KPIs)
  - effective completion of tasks
  - better resolve of complaints
  - shared goals and accountability
  - upholding core values
  - upholding brand promise

- **Recognise colleagues as internal customers** - encouraging everyone in the organisation to treat colleagues with the same respect as customers. Benefits include increased productivity and employees feeling valued.

Equality	
Behaviour	
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	
Practical observation (including Q&A)	
Pass criteria	**Distinction criteria**
B4.1 Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting **equality, diversity and inclusion** in their customer service delivery	*There are no distinction criteria for this component*
Amplification and guidance	

- **Equality, diversity and inclusion**
  - 9 protected characteristics:
    - age
    - disability
    - gender reassignment
    - marriage and civil partnership
    - pregnancy and maternity
    - race, religion or belief
    - sex and sexual orientation
  - Inclusive customer service for diverse groups of customers - policies/facilities such as access to information in different languages, large print on documents and hearing loops

<table>
<tr><th colspan="2">Presentation</th></tr>
<tr><th colspan="2">Behaviour</th></tr>
<tr><td colspan="2">Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction</td></tr>
<tr><td colspan="2">Ensure your personal presentation, in all forms of communication, reflects positively on your organisation’s brand</td></tr>
<tr><th colspan="2">Practical observation (including Q&A)</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>B5.1 Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction
B5.2 Evidence to show how their personal presentation made a positive impact on their organisation’s brand</td><td>There are no distinction criteria for this component</td></tr>
<tr><th colspan="2">Amplification and guidance</th></tr>
<tr><td colspan="2">Brand advocacy:
organisation’s culture, values and beliefs
organisation promotion in a good light</td></tr>
</table>

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Assessment summary

The end-point assessment for Customer Service Specialist apprenticeship standard is made up of 3 assessment methods:

1. A 2,500-word (+/- 10%) work-based project, supported by a 60-minute interview (+/-10%)
2. A 60-minute (+/-10%) professional discussion, supported by portfolio of evidence
3. A 60-minute (+/- 10%) practical observation with Q&As

The assessment plan recommends that the work-based project is the first assessment, followed by the professional discussion and then finally the practical observation.

As an employer/training provider, you should agree a plan and schedule with the apprentice to ensure all assessment components can be completed effectively.

Each component of the end-point assessment will be assessed against the appropriate criteria laid out in this kit, which will be used to determine a grade for each individual. The grade will be determined using the combined grades.

Work-based project (supported by interview)

The work-based project (supported by an interview) is equally weighted with all other assessment methods. Apprentices will be marked against the pass and distinction criteria outlined in this kit.

- To achieve a **pass**, apprentices must achieve **all** of the pass criteria
- To achieve a **distinction**, apprentices must achieve **all** of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will not have achieved **all** of the pass criteria

Professional discussion (supported by portfolio of evidence)

The professional discussion (supported by a portfolio of evidence) is equally weighted with all other assessment methods. Apprentices will be marked against the pass and distinction criteria outlined in this kit.

- To achieve a **pass**, apprentices must achieve **all** of the pass criteria

- To achieve a **distinction**, apprentices must achieve **all** of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will not have achieved **all** of the pass criteria

Practical observation (with Q&As)

The practical observation (with Q&As) is equally weighted with all other assessment methods. Apprentices will be marked against the pass and distinction criteria outlined in this kit.

- To achieve a **pass**, apprentices must achieve **all** of the pass criteria
- To achieve a **distinction**, apprentices must achieve **all** of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will not have achieved **all** of the pass criteria

Grading

The apprenticeship includes pass and distinction grades, with the final grade based on the apprentice's combined performance in each assessment method.

To achieve a pass, the apprentice must meet all pass criteria in all assessment methods.

To achieve a distinction, the apprentice must meet all the pass criteria and distinction criteria in all assessment methods.

The overall grade for the apprentice is determined using the matrix below:

Work-based project (supported by an interview)	Professional discussion (supported by a portfolio of evidence)	Practical observation (with Q&As)	Overall grade awarded
Fail any of the 3 assessment methods			**Fail**
Pass	Pass	Pass	**Pass**
Distinction	Pass	Pass	**Pass**
Pass	Distinction	Pass	**Pass**
Pass	Pass	Distinction	**Pass**
Distinction	Distinction	Pass	**Pass**
Pass	Distinction	Distinction	**Pass**
Distinction	Pass	Distinction	**Pass**
Distinction	Distinction	Distinction	**Distinction**

Retake and resit information

If the apprentice fails any part of the end-point assessment, 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. If a retake is chosen, the apprentice will need to complete a retake checklist. Once this is completed, please call the Highfield scheduling team to arrange the retake.

Apprentices are able to retake/resit any individual assessment component where a pass has not been achieved. If a retake/resit is required, apprentices should complete retake/resits within 12 months. There is no limit to the number or retake/resits within the 12 months. An apprentice cannot retake/resit any part of the EPA to increase their grade from a pass to a distinction. The maximum grade awarded to a resit will be pass, unless Highfield 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 is able to submit previous evidence along with 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 Highfield whose decision is final.

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Assessing the work-based project (supported by an interview)

This end-point assessment method consists of 2 components:

- work-based project report
- interview

Component 1: Work-based project report

Apprentices must submit a written report, on a project they have carried out, 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 **2,500-words** (+/- 10%), excluding annexes. All work on the project will be undertaken following the gateway process over a 2-month period.

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
- any feedback from the customer
- 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
- feedback

The work-based project is designed to ensure the apprentice's learning meets the needs of the business and is relevant for 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.

Component 2: Interview

The work-based project will be supported by an interview. The interview will last for **60 minutes (+/- 10%)**. The interview will focus on the written project and any supporting annexes. The interview will take place before the 3-month end-point assessment period.

The interview can take place either face-to-face or via online video conferencing, if appropriate. Highfield must ensure that the interview and questioning elements are conducted in a suitable controlled environment, for instance, a quiet room, free from distraction and influence, with the necessary equipment for each assessment method.

The apprentice will be asked **10 competency-based questions** by the end-point assessor, to provide the apprentice with as much opportunity as possible to evidence all the relevant KSBs or any criteria that have not been achieved in the project report.

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.

Before the assessment

Employers/training providers should:

- give the apprentice time to work on their project and report during the end-point assessment window
- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which customer service specialist criteria will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard and identify real-life examples
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

Grading the work-based project (supported by an interview)

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages (under 'Work-based project supported by an interview criteria').

- To achieve a **pass**, apprentices must meet all of the pass criteria.
- To achieve a **distinction**, apprentices must meet all of the pass **and** distinction criteria.
- **Unsuccessful** apprentices will not have achieved all of the pass criteria

Work-based project interview - mock assessment

It is suggested that a mock assessment is carried out by the apprentice in advance of the end-point assessment with the training provider/employer giving feedback on any areas for improvement. It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment and Highfield recommend that the apprentice experiences a mock interview in preparation for the real thing. The most appropriate form of mock assessment will depend on the apprentice's setting and the resources available at the time.

When planning the mock assessment, the employer/training provider should include the following elements:

- the mock interview should be **60 minutes (+/- 10%)**, so a suitable amount of time should be available to complete the full mock interview.
- consider a recording of the mock assessment and allow it to be played back to other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice.
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience.
- mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.
- the trainer/assessor must ask **10 structured and 'open' questions** as part of the interview that do not lead the candidate but allow them to express their knowledge in a calm and comfortable manner. Some examples of this may include the following:
    - business knowledge and understanding
        - What is the impact of the organisation's mission statement?
        - How does the organisation's mission statement affect your customer service?
    - customer service culture and environment awareness

        - Why is effective communication between departments important for providing good customer service?
        - Identify potential causes of service failure within your organisation.
    - providing a positive customer experience
        - How is data analysed, used and presented?
        - How does collected data impact the customer journey?
    - working with your customer/customer insights
        - How has knowing your customer and their needs directly impacted your working practices?
        - How do you evaluate the feedback you receive from customers?
    - service improvement
        - What do you do with customers' data once it has been analysed?
        - How does legislation affect recommendations for the future of the organisation?

Work-based project (supported by an interview) criteria

Throughout the work-based project (supported by an interview), the assessor will review the apprentice's competence in the criteria outlined below.

Apprentices should prepare for the work-based project (supported by an interview) by considering how the criteria can be met and reflecting on their past experiences.

Business knowledge and understanding
To pass, the following must be evidenced.
K1.1 Evidences that they understand the impact of the organisation's mission statement and business strategy on customer service delivery and makes recommendations for future improvements **K1.2** 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 role
To gain a distinction, the following must be evidenced
K1.3 *Evidence to support their research and analysis of customer service standards and mission statements of other organisations in comparison to their own organisation's to inform their recommendations* ***K1.4*** *Ability to consider the possible impact on their organisation of not considering the future in decision-making*

Customer journey knowledge
To pass, the following must be evidenced.
K2.1 Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes **K2.2** An understanding of the underpinning business processes that support them on bringing about the best outcome for customer and their organisation
To gain a distinction, the following must be evidenced
There are no distinction criteria for this component

Customer service culture and environment awareness
To pass, the following must be evidenced.
K4.3 Ability to discuss the internal and external factors influencing their business environment and culture **K4.4** Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery **K4.5** Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service **K4.6** Ability to identify potential causes of service failure and the consequences of these
To gain a distinction, the following must be evidenced
K4.7 *Ability to demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation*

Business-focused service delivery
To pass, the following must be evidenced.
S1.3 Evidences when they made decisions and recommendations to improve their own customer service delivery
To gain a distinction, the following must be evidenced
S1.4 *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
To pass, the following must be evidenced.
S2.8 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 **S2.9** Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others
To gain a distinction, the following must be evidenced
S2.10 *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* ***S2.11*** *Provides evidence to show when they analyse the risks and opportunities to implementing change*

Working with your customer/customer insights
To pass, the following must be evidenced.
S3.1 Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements **S3.2** 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
To gain a distinction, the following must be evidenced
S3.3 *Demonstrates how knowing their customer and their needs has a direct impact on:* *a. Their working practices* *b. Organisational policy/procedures* ***S3.4*** *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
To pass, the following must be evidenced.
S5.1 Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers **S5.2** Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required **S5.3** Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change
To gain a distinction, the following must be evidenced
S5.4 *Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s)*

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Assessing the professional discussion (supported by portfolio of evidence)

The professional discussion is a structured discussion between the apprentice and the end-point assessor. The end-point assessor will ask the apprentice to discuss their time on-programme that is relevant to the criteria.

The professional discussion will last for **60 minutes (+/- 10%)**.

The apprentice **must** submit the portfolio of evidence to Highfield Assessment **2 weeks before** the set date of the professional discussion.

The professional discussion can be either face-to-face or via online video conference, if appropriate. Highfield must ensure that it is conducted in a suitable controlled environment, for instance, a quiet room, free from distraction and influence.

During and after the time the apprentice spends on-programme, they should be collecting evidence of interactions with customers, managers and stakeholders that will be used to support the professional discussion.

During the professional discussion, the apprentice should extract/discuss information from the on-programme portfolio of evidence they collect and build during their time on-programme. This will be used as a base to support the professional discussion and relate to the relevant criteria.

The apprentice **can** bring their portfolio of evidence with them to the professional discussion.

Before the assessment

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which criteria will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

Grading the professional discussion (supported by a portfolio of evidence)

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages (under 'Professional discussion supported by a portfolio of evidence criteria').

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will have not achieved all of the pass criteria

Professional discussion (supported by portfolio of evidence) mock assessment

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment. Highfield recommends that the apprentice experiences a mock professional discussion (supported by a portfolio of evidence) in preparation for the real thing. The most appropriate form of mock professional discussion (supported by a portfolio of evidence) will depend on the apprentice's setting and the resources available at the time.

In designing a mock assessment, the employer/training provider should include the following elements in its planning:

- the mock professional discussion (supported by a portfolio of evidence) should take place in a suitable location.
- a **60-minute** time slot should be available to complete the professional discussion (supported by a portfolio of evidence), if it is intended to be a complete professional discussion covering all relevant standards. However, this time may be split up to allow for progressive learning.
- consider a video or audio recording of the mock professional discussion (supported by a portfolio of evidence) and allow it to be available to other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice.
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.
- use structured, 'open' questions that do not lead the apprentice but allows them to express their knowledge and experience in a calm and comfortable manner. For example:
    - business knowledge and understanding

        - How does your role meet the organisation's customer service standards?
        - Explain the leadership styles that were most effective for you to use in a customer service environment.
    - customer journey knowledge
        - Why do customers' issues and situations need special attention within the organisation?
        - Tell me about your company's SLAs, your own level of authority and how this affects your customer service.
    - providing a positive customer experience
        - Discuss a time when you have met the needs of your customers as well as the company and what cost implications were incurred.

Professional discussion (supported by portfolio of evidence) criteria

Throughout the **60-minute** professional discussion (supported by a portfolio of evidence), the assessor will review the apprentice's competence in the criteria outlined below.

Apprentices should prepare for the professional discussion (supported by a portfolio of evidence) considering how the criteria can be met.

Business knowledge and understanding
To pass, the following must be evidenced.
K1.5 Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments **K1.6** Evidence of how they identify the different types of leadership styles that work best in their customer environment
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Customer journey knowledge
To pass, the following must be evidenced.
K2.3 Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation **K2.4** Ability to adhere to their organisations service level agreement and demonstrates an awareness of the limit of their authority when providing customer service
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Knowing your customer and their needs/customer insight
To pass, the following must be evidenced.
K3.1 Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations **K3.2** Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation
To gain a distinction, the following must be evidenced.
***K3.3** Evidences when they have analysed the importance of their professional image and its relationship with the organisation's brand*

Customer service culture and environment awareness
To pass, the following must be evidenced.
K4.1 Evidences knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Business-focused service delivery
To pass, the following must be evidenced.
S1.5 Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Providing a positive customer experience
To pass, the following must be evidenced.
S2.1 Demonstrates when they have balanced the meeting of their customer and their organisation's needs while showing they have considered cost implications
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Develop self
To pass, the following must be evidenced.
B1.1 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
To gain a distinction, the following must be evidenced.
B1.2 *Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach*

Ownership/responsibility
To pass, the following must be evidenced.
B2.1 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
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Teamworking
To pass, the following must be evidenced.
B3.1 Demonstrate sharing own knowledge and experience with others, to support colleague development
To gain a distinction, the following must be evidenced.
B3.2 *Evidences when they have assessed the impact of sharing their own knowledge on:* *a. Their development* *b. Colleague development*

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Assessing the practical observation (with Q&As)

The practical observation is to be covered in 1 session, lasting **1 hour** with a +/- 10% tolerance either way. The observation will be pre-planned giving the apprentice a **minimum of 2 weeks' notice** of the date it is set to take place.

The apprentice must be observed 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.

During the practical observation, the apprentice should have the opportunity, if required, to move from one area/function of the business to another, allowing the best possible chance for situations to occur naturally and to enable the apprentice to demonstrate how they have applied their KSBs.

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
- enough space for the apprentice to do their job

The practical observation must take place in the apprentice's workplace. The observation must include questioning to clarify knowledge and understanding is being applied. 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 assess 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 to be before the professional discussion.

Before the assessment

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which customer service specialist criteria will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard and identify real-life examples

- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

Grading the practical observation (with Q&As)

The practical observation (with Q&As) will be marked against the pass and distinction criteria included in the tables on the following pages (under 'Practical observation (with Q&As) criteria').

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will have not achieved all of the pass criteria

Practical observation (with Q&As) mock assessment

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment. Highfield recommends that the apprentice completes a mock practical observation (with Q&As) in advance of the end-point assessment, with the training provider/employer giving feedback on any areas for improvement.

In designing a mock assessment, the employer/training provider should include the following elements in its planning:

- the mock practical observation (with Q&As) should take place in a suitable location.
- a **60-minute (+/-10%)** time slot should be available for the practical observation, if it is intended to be a complete mock practical observation covering all relevant standards (outlined in the following pages). However, this time may be split up to allow for progressive learning.
- consider a video or audio recording of the mock practical observation (with Q&As) and allow it to be available to other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock observation with questions with each apprentice.
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.
- the employer/training provider can have other personnel to play the parts of customers and team members to make the mock more realistic.

- it is recommended that the mock observation has been practised with all personnel involved before taking place so that everyone is briefed and aware of their roles. The mock should provide the opportunity for the apprentice to demonstrate both the 'pass' level and the 'distinction' level criteria.
- use structured 'open' questions that do not lead the apprentice but allows them to give examples for how they have met each area in the standard. For example:

    - knowing your customers and their needs/customers
        - How have you balanced the needs of different customers, considering their emotions and how factors like age or culture affect their expectations?
    - service culture and their needs/customer insight
        - Can you provide an example of how you've adapted your customer service approach to comply with laws or regulations, and how this impacted the customer experience?
    - business-focused service delivery
        - Explain how you handled a difficult customer issue, including how you assessed the situation and provided solutions that worked for both the customer and the business.
    - providing a positive customer experience
        - Can you describe a time when you used questioning and listening skills to understand a customer's needs and negotiate a solution that worked for both the customer and your organisation?

Practical observation (with Q&As) criteria

Throughout the **60-minute** practical observation (with Q&As), the assessor will review the apprentice's competence in the criteria outlined below.

Apprentices should prepare for the practical observation (with Q&As) by considering how the criteria can be met.

Knowing your customers and their needs/customer
To pass, the following must be evidenced.
K3.4 Demonstrate how they analyse, use and present a range of information in order to provide customer insight **K3.5** An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them **K3.6** Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types **K3.7** Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Customer service culture and their needs/customer insight
To pass, the following must be evidenced.
K4.2 Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Business-focused service delivery
To pass, the following must be evidenced.
S1.1 An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements
To gain a distinction, the following must be evidenced.
S1.2 *Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs*

Providing a positive customer experience
To pass, the following must be evidenced.
S2.2 Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes **S2.3** Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction **S2.4** Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures **S2.5** Recognises when customer emotions have been affected by the level of service offered **S2.6** Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes
To gain a distinction, the following must be evidenced.
S2.7 *Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement*

Customer service performance
To pass, the following must be evidenced.
S4.1 Evidences when they have maintained a positive relationship even when they are unable to deliver the customers expected outcome **S4.2** Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Ownership/responsibility
To pass, the following must be evidenced.
B2.2 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 **B2.3** Shows proactivity and creativity when identifying solutions to customer and organisational issues
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Teamworking
To pass, the following must be evidenced.
B3.3 Demonstrates achievement of results through effective teamwork and collaboration with colleagues at all levels **B3.4** Shows adaptability of own skills when working with internal customers
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Equality
To pass, the following must be evidenced.
B4.1 Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

Presentation
To pass, the following must be evidenced.
B5.1 Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction **B5.2** Evidence to show how their personal presentation made a positive impact on their organisation’s brand
To gain a distinction, the following must be evidenced.
There are no distinction criteria for this component

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