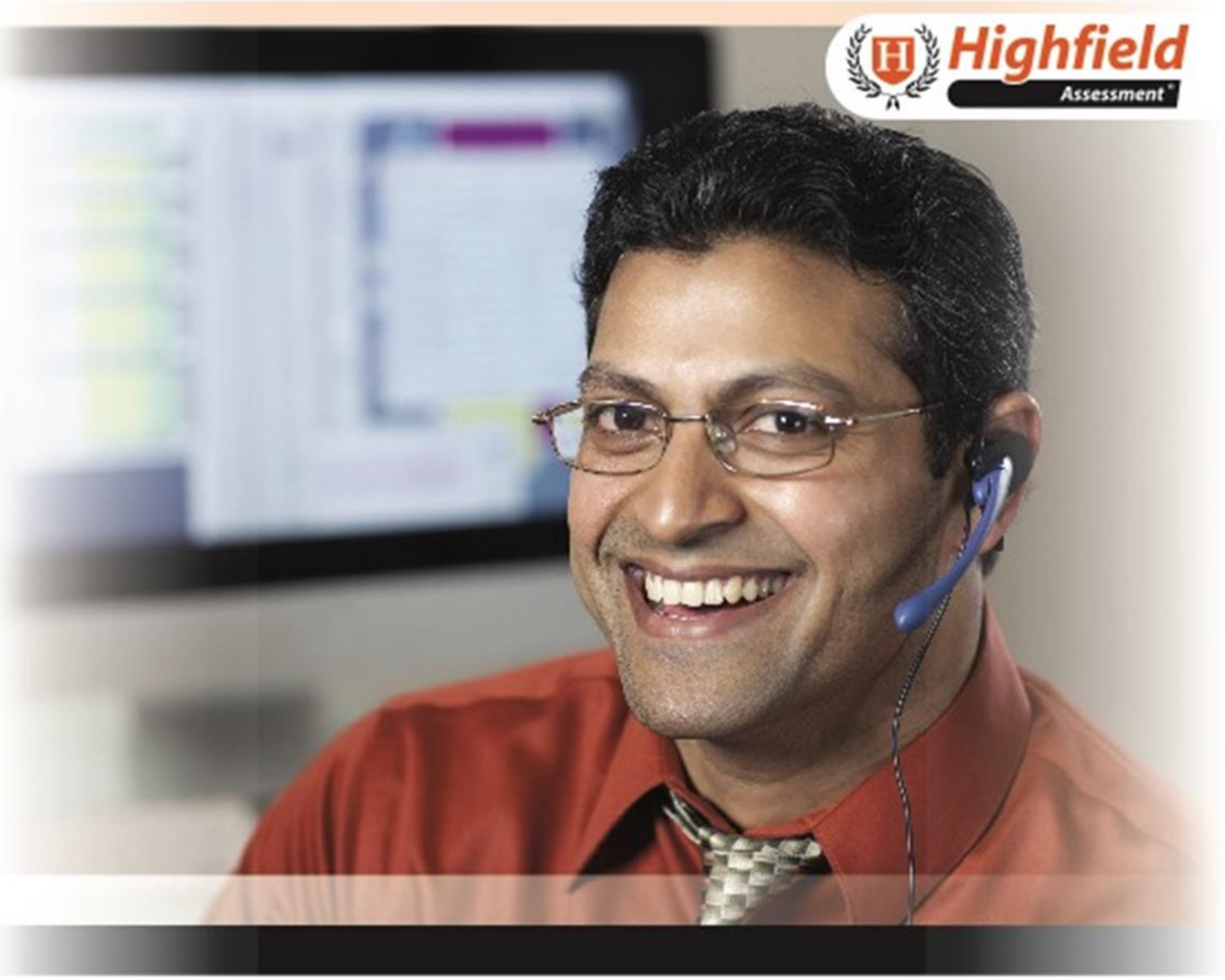
Highfield Level 3 End-Point Assessment for ST0071 Customer Service Specialist

End-Point Assessment Kit



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

EPA Kit

Contents

Please click on the headings below to navigate to the associated section of the EPA kit.

How to use this EPA kit

Welcome to the Highfield end-point assessment kit for the Level 3 Customer Service Specialist Apprenticeship Standard.

Highfield are 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. 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.

You will utilise both organisational and generic IT systems to carry out your role with an awareness of other digital technologies. This could be in many types of environment including contact centres, retail, webchat, service industry or any customer service point.

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. The apprentice may start the end-point assessment at the earliest after 15 months on-programme.

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

- use of 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, e.g. mentors, workplace coaches, etc. They should agree 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, that has

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

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 employer and the apprentice to confirm that the portfolio is valid and attributable to the apprentice.

The portfolio of evidence must be submitted to Highfield at gateway. It is not directly assessed but underpins the professional discussion.

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

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

- the apprentice must have achieved level 2 English and maths.
- the apprentice must have gathered a portfolio of evidence to be put forward as a basis for the professional discussion (supported by a portfolio of evidence).
- 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.
- a proposal form will be completed by the apprentice and brought with them to the gateway meeting 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 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

In accordance with the customer service specialist assessment plan:

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

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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:

- achieved level 2 English
- achieved level 2 maths

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, e.g. employee ID card, travel card, etc.

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The Customer Service Specialist Apprenticeship Standard

The following pages contain the Level 3 Customer Service Specialist Apprenticeship Standard and the assessment criteria in a format that is suitable for delivery.

<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><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>
<tr><th colspan="2">Work-based project (supported by 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 Ability to consider the possible impact on their organisation of not considering the future in decision-making.
K1.4 Provides evidence to show when they analyse the risks and opportunities to implementing change.</td></tr>
</table>

<table>
<tr><th colspan="2">Professional discussion (supported by portfolio of evidence)</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>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.</td><td>K1.7 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">

Mission statement
A mission statement is a short statement of an organisation's purpose, identifying the goal of its operations
Business strategy
A summary of how a business plans to achieve its goals and how it improves and sustains it position in the industry
Leadership styles
A leadership style is a leader's style of providing direction, implementing plans and motivating people; examples of this may include transformational, transactional, servant, autocratic, democratic and bureaucratic
Future-focused approach
This is completed through a SWOT or PESTLE analysis to identify factors that might influence future customer service strategy or activities

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

<table>
<tr><th colspan="2">Customer journey knowledge</th></tr>
<tr><td colspan="2">Knowledge</td></tr>
<tr><td colspan="2">Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience</td></tr>
<tr><td colspan="2">Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation</td></tr>
<tr><td colspan="2">Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention</td></tr>
<tr><td colspan="2">Understand commercial factors and authority limits for delivering the required customer experience</td></tr>
<tr><td colspan="2">Work-based project (supported by interview)</td></tr>
<tr><td>Pass criteria</td><td>Distinction criteria</td></tr>
<tr><td>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</td><td>There are no distinction criteria for this component</td></tr>
<tr><td colspan="2">Professional discussion (supported by portfolio of evidence)</td></tr>
<tr><td>Pass criteria</td><td>Distinction criteria</td></tr>
<tr><td>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.</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">Limit of their authority
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.
Specialist attention</td></tr>
</table>

- These are contractual obligations or 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.

- **Underpinning business processes**
  - Complaint handling policy/procedure, customer management systems, feedback processes, incentives and penalties.

Knowing your customers and their needs/customer insight	
Knowledge	
Know your internal and external customers and how their behaviour may require different approaches from you	
Understand what drives loyalty, retention and satisfaction and how they impact on your organisation	
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	
Professional discussion (supported by portfolio of evidence)	
Pass criteria	**Distinction criteria**
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.	*There are no distinction criteria for this component*
Practical observation (including Q&A)	
Pass criteria	**Distinction criteria**
K3.3 Demonstrates how they analyse, use and present a range of information in order to provide customer insight. K3.4 An ability to assess at least 3 different **customer types** and their role of emotions in order to achieve a successful outcome for them. K3.5 Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.	*There are no distinction criteria for this component*
Amplification and guidance	
• **Customer types** ○ Internal, external, business/corporate, domestic, vulnerable	

Customer service culture and environment awareness	
Knowledge	
Keep current knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers	
Understand your business environment and culture and the position of customer service within it	
Understand your organisation’s structure, what role each department needs to play in delivering customer service and what the consequences are should things go wrong	
Understand how to find and use industry best practice to enhance own knowledge	
Professional discussion (supported by portfolio of 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*
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*
Work-based project (supported by 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 K4.5 Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service	*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.*

K4.6	Ability to identify potential causes of service failure and the consequences of these	

Business-focused service delivery	
Skills	
Demonstrate a continuous improvement and future-focused approach to customer service delivery including decision-making and providing recommendations or advice	
Resolve complex issues by being able to choose from and successfully apply a wide range of approaches	
Find solutions that meet your 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.*
Work-based project (supported by interview)	
Pass criteria	**Distinction criteria**
S1.3 Evidences when they made decisions and recommendations to improve their own customer service delivery	*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.*
Professional discussion (supported by portfolio of 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*

<table>
<tr><th colspan="4">Providing a positive customer experience</th></tr>
<tr><th colspan="4">Skills</th></tr>
<tr><td colspan="4">Through advanced questioning, listening and summarising, negotiate mutually beneficial outcomes</td></tr>
<tr><td colspan="4">Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy</td></tr>
<tr><td colspan="4">Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps</td></tr>
<tr><td colspan="4">Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction</td></tr>
<tr><td colspan="4">Demonstrate a cost-conscious mindset when meeting customer and the business needs</td></tr>
<tr><td colspan="4">Identify where highs and lows of the customer journey produce a range of emotions in the customer</td></tr>
<tr><td colspan="4">Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format</td></tr>
<tr><th colspan="4">Professional discussion (supported by portfolio of evidence)</th></tr>
<tr><th colspan="2">Pass criteria</th><th colspan="2">Distinction criteria</th></tr>
<tr><td>S2.1</td><td>Demonstrates when they have balanced the meeting of their customer and their organisations needs while showing they have considered cost implications</td><td>S2.2</td><td>Evidences when they have analysed the importance of their professional image and its relationship with the organisations brand.</td></tr>
<tr><th colspan="4">Practical observation (including Q&A)</th></tr>
<tr><th colspan="2">Pass criteria</th><th colspan="2">Distinction criteria</th></tr>
<tr><td>S2.3

S2.4</td><td>Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes
Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction</td><td>S2.8</td><td>Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.</td></tr>
</table>

<table>
<tr><td>S2.5 Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures
S2.6 Recognises when customer emotions have been affected by the level of service offered
S2.7 Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes</td><td></td></tr>
<tr><th colspan="2">Work-based project (supported by interview)</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>S2.9 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
S2.10 Demonstrates how they communicate with customers, gaining full information on their experience and recommend improvements to customer service delivery to others</td><td>S2.11 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><th colspan="2">Amplification and guidance</th></tr>
<tr><td colspan="2">Identify trends/recurring issues
Customer satisfaction surveys, complaint resolution and escalation analysis, customer feedback, market indicators
Knowledge of a range of questioning techniques, active listening, note-taking</td></tr>
</table>

<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 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>
</table>

Customer service performance	
Skills	
Maintain a positive relationship, even when you are unable to deliver the customers expected outcome	
When managing referrals or escalations, take into account historical interactions and challenges to determine next steps	
Practical observation (including Q&A)	
Pass criteria	**Distinction criteria**
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.	*There are no distinction criteria for this component*

<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 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 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.
S5.5 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>

Develop self	
Behaviour	
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	
Professional discussion (supported by portfolio of evidence)	
Pass criteria	**Distinction criteria**
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.	*B1.2 Evidences when they have assessed the impact of sharing their own knowledge on:* *a. Their development* b. *Colleague development*
Amplification and guidance	
• **Learning and development goals** ○ Reaching performance standards and acquiring new knowledge or skills ○ E-learning, workbooks, training, coaching or mentoring ○ Explanation of SMART objectives and at least one example where they have been applied in personal development plan	

Ownership/responsibility	
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	
Make realistic promises and deliver on them	
Professional discussion (supported by portfolio of 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*
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 and non-verbal – telephone, email, social media, letters etc. ○ Use of effective communication in reducing conflict – remaining calm/demonstrating empathy	

Teamworking	
Behaviour	
Work effectively and collaboratively with colleagues at all levels to achieve results	
Recognise colleagues as internal customers	
Share knowledge and experience with others to support colleague development	
Professional discussion (supported by portfolio of evidence)	
Pass criteria	**Distinction criteria**
B3.1 Demonstrate sharing own knowledge and experience with others, to support colleague development	*There are no distinction criteria for this component*
Practical observation (including Q&A)	
Pass criteria	**Distinction criteria**
B3.2 Demonstrates achievement of results through effective teamwork and collaboration with colleagues at all levels. B3.3 Shows adaptability of own skills when working with internal customers.	*There are no distinction criteria for this component*

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 Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types. B4.2 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, hearing loops	

Presentation	
Behaviour	
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	
Practical observation (including Q&A)	
Pass criteria	**Distinction criteria**
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.	*There are no distinction criteria for this component*
Amplification and guidance	
• **Brand advocacy** ○ Organisation's culture, values and beliefs ○ Organisation promotion in a good light	

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Assessment summary

The end-point assessment for customer service specialist is made up of 3 components:

1. A 2,500-word work-based project (+/- 10%), 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 guide, which will be used to determine a grade for each individual component.

Work-based project (supported by interview)

In order to achieve a pass in the work-based project:

all pass criteria **must** be achieved

To achieve a distinction in the work-based project:

- **all** pass criteria and all of the distinction criteria **must** be achieved

Professional discussion (supported by portfolio of evidence)

In order to achieve a pass in the professional discussion:

- **all** pass criteria **must** be achieved

To achieve a distinction in the professional discussion:

- **all** pass criteria and all of the distinction criteria **must** be achieved

Practical observation with Q&As

In order to achieve a pass in the practical observation:

- **all** pass criteria **must** be achieved

To achieve a distinction in the practical observation:

- **all** pass criteria and all of the distinction criteria **must** be achieved

Retake and resit information

If the apprentice fails any part of the end-point assessment, further development must be provided prior to a re-sit or re-take. A re-take requires the apprentice to undertake further learning and therefore they would need to go through the Gateway process again. If a retake is chosen, the apprentice will require a period of further learning and will need to complete a retake checklist.

Apprentices are able to retake/re-sit any individual assessment component where a pass has not been achieved. If a retake/re-sit is required, apprentices should complete retake/resits within 12 months. There is no limit to the number or retake/re-sits within the 12 months. An apprentice cannot retake/re-sit any part of the EPA to increase their grade from a pass to a distinction. The maximum grade awarded to a re-sit will be pass, unless 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

The work-based project is designed to ensure an apprentice's learning meets the needs of the business and is relevant for their role.
The employer should ensure that the apprentice has a suitable amount of time and the necessary resources to plan and undertake the research and produce the written report.
The work-based project is supported by an interview that takes place after the project report has been reviewed.

The apprentice must produce a **2,500-word** (+/- 10%) report based on a specific high-level challenge (such as a complaint or difficult situation) that they have had to deal with.
The report should cover the following areas:

- an explanation of what the situation was
- what actions the apprentice took
- what solutions were offered
- details of any recommendations made to change a policy or process
- any feedback from the customer
- what the apprentice's responsibilities were
- what the results were

Before writing the work-based project report

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 200 to 300-word proposal of what their proposed project is and bring this proposal to the formal gateway meeting. The proposal **must** be made available to Highfield Assessment at gateway.

The end-point assessor will review the proposal of the project at the gateway meeting. 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.

Work-based project report

The project must be started **after** the gateway process and must be completed **within a 2-month period**.

The written report **must be 2,500 words** in length (+/- 10%) excluding any annexes and focus on a high-level challenge the apprentice has faced, such as a difficult situation or complaint.

End-point assessors will only mark projects up to 2500 words +/- 10% (maximum 2750 words), at which point assessors will stop marking and only credit the criteria achieved to that point. Projects that fall short of the word count will be marked to achieve all potential criteria.

The report should contain annexes that are attributable to the apprentice and the actions that they took regarding the high-level challenge they encountered. The annexes do not contribute to the word count.

Example evidence that may be included in the annex:

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

Two weeks before the date of the interview, the apprentice should submit the completed project report to Highfield Assessment for marking.

They will then attend either a face-to-face or video interview to discuss the report and any supporting annexes. The interview must take place before the end of the 3-month end-point assessment period.

The work-based project report can be submitted in any format but if submitting via e-portfolio, please allow access to only the specific work of the candidate who is due to be assessed.

Work-based project interview

The date of the interview will be agreed when the apprentice passes through the gateway process. The interview is between the apprentice and the end-point assessor, however, if the employer wishes to, they can have a representative of the organisation present for the interview. The representative must not be involved with any part of the interview or the grading decision other than to observe.

The work-based written project and any supporting annexes will form the basis of the interview. The interview will last for **60 minutes (+/- 10%)** and 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.
The questions the apprentice will be asked are selected from a bank available to the assessor.

The assessor can ask the apprentice to explain themselves further based on their answers to the questions but **cannot** ask any more questions outside of the competency questions.

Highfield have provided a sample report template that the apprentice can make use of should they wish. Guidance as to what each section of the report could contain is also found in this document.
A mapping document has also been created for the apprentice to use to ensure coverage of the criteria outlined for this assessment method.

Grading the work-based project report and interview

Apprentices will be marked against the pass and distinction criteria included in the tables below. Apprentices need to achieve **all pass criteria** to be awarded a pass and all pass and **all of the distinction** criteria to be awarded a distinction.

Work-based project report and interview order

1. Apprentice prepares a 200-300-word proposal that details what their project is going to be about. The proposal is discussed between the apprentice and the employer/training provider.
2. Apprentice brings their proposal to the gateway meeting. If the proposal is approved, the apprentice can start writing their project report. If the proposal is not approved, the apprentice has 1 week to rewrite and resubmit this.
3. At the gateway meeting, the date of the interview is discussed.
4. The project report must be completed within 2 months of the gateway meeting.
5. The completed project report must be submitted to Highfield 2 weeks before the interview date.
6. The end-point assessor receives, reviews and marks the project report and selects 10 competency-based questions from their question bank to use in the interview.
7. The 60-minute interview takes place.

Work-based project interview - mock assessment

The employer/training provider should spend a suitable amount of time preparing apprentices for this end-point assessment component.
Highfield recommends that all apprentices should experience at least 1 mock interview in preparation for the real thing. The apprentice can go through as many mock interviews as they wish in order to allow them to prepare suitably.

When planning the mock assessment, the employer/training provider should take the following details into consideration.

- The interview needs to last for **60-minutes (+/- 10%)**, so a suitable amount of time should be available to complete the full mock interview.
- It is recommended that the interview is split up into sections to **allow progressive learning** throughout the interview period where the apprentice can discuss their answer and ask questions as to what may help them cover the criteria in the standard more effectively.
- Audio recording the mock and/or allowing the mock to be observed by other apprentices might be beneficial. This may be necessary for certain employers/training providers if it is not practical to carry out separate mock assessments with each apprentice.
- The apprentice's performance should be assessed by a competent trainer/assessor.
- **Feedback and guidance should be shared** with the apprentice to complete the learning experience. The mock assessment document sheets found as a separate download 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 apprentice but allow them to express their knowledge in a calm and comfortable manner.

Example questions that could be used as part of the mock interview 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?
- Providing a positive customer experience
    - How is data analysed, used and presented?
    - How does collected data impact the customer journey?
- 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

Pass criteria	*Distinction criteria*
Business knowledge and understanding 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.	K1.3 Ability to consider the possible impact on their organisation of not considering the future in decision-making. K1.4 Provides evidence to show when they analyse the risks and opportunities to implementing change.
Customer journey knowledge 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*
Customer service culture and environment awareness 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	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 S1.3 Evidences when they made decisions and recommendations to	S1.4 Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended

improve their own customer service delivery.	alternative methods likely to improve results, stating reasons for choice.
Providing a positive customer experience S2.9 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. S2.10 Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.	S2.11 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.
Working with your customers/customer insights 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.	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 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.	S5.4 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. S5.5 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 will be 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 is used to establish whether the apprentice has gained suitable knowledge, skills and behaviours in order to evidence the set criteria.

The professional discussion should be completed face to face and will last **60 minutes (+/- 10%)**.

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.

Portfolio of evidence

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 criteria relevant to the professional discussion.

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

The portfolio of evidence should consist of a **minimum** of 10 and a **maximum** of 15 pieces of evidence and should relate to the standards that apply to the professional discussion.

The portfolio of evidence is not directly assessed and will only be used as a springboard or prompt for the apprentice to be able to successfully evidence the required KSBs.
The apprentice **can** bring their portfolio of evidence with them to the professional discussion.

This portfolio of evidence **could** include: witness statements, customer feedback such as emails or letters, and manager feedback from one-to-ones or similar.

The portfolio of evidence can be submitted in any format but if submitting via e-portfolio, please allow access to only the specific work of the candidate who is due to be assessed.

The apprentice is **recommended** to number their pieces of evidence that relate to the criteria and confirm in the portfolio which piece of evidence is applicable to the relevant standard(s).
There is a portfolio of evidence mapping/matrix document at the end of this EPA kit available on the Highfield Assessment website that can be used for the planning of this assessment method.

The evidence is used by the independent assessor in order to plan the discussion.

Grading the professional discussion with portfolio of evidence

Apprentices will be marked against the pass and distinction criteria included in the tables below. Apprentices need to achieve **all pass criteria** to be awarded a pass and all pass and **all of the distinction** criteria to be awarded a distinction.

Professional discussion (supported by portfolio of evidence) mock assessment

The employer/training provider should spend a suitable amount of time preparing apprentices for their professional discussion end-point assessment.

Highfield recommends that the apprentice experiences at least 1 mock professional discussion in preparation for the real thing. The apprentice should be allowed to experience as many mock professional discussions as possible to allow them to prepare suitably.

When designing a mock assessment, the employer/training provider should consider the following elements.

- A **60-minute** (+/- 10%) time slot should be available for the complete professional discussion, if it is intended to be a complete mock assessment covering all relevant standards. This time may be split up to allow for progressive learning with the apprentice.
- Audio recording the mock and/or allowing the mock to be observed by other apprentices might be beneficial. This may be necessary if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice.
- The apprentice's performance should be assessed by a competent trainer/assessor.
- **Feedback and guidance should be shared** with the apprentice to complete the learning experience. The mock assessment document sheets found as a separate download may be used for this purpose.
- The trainer/assessor should ask structured 'open' questions as part of the professional discussion, that do not lead the candidate but allow them to express their knowledge, skills and behaviours in a calm and comfortable manner.

Some example questions may include the following:

- 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

Pass criteria	*Distinction criteria*
Business knowledge and understanding 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.	*K1.7 Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach.*
Customer journey knowledge 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.	*There are no distinction criteria for this component*
Knowing your customers and their needs/customer insight 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.	*There are no distinction criteria for this component*
Customer service culture and environment awareness 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*
Business focused service delivery 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*

Providing a positive customer experience S2.1 Demonstrates when they have balanced the meeting of their customer and their organisation's needs while showing they have considered cost implications.	S2.2 Evidences when they have analysed the importance of their professional image and its relationship with the organisation's brand.
Develop self 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.	B1.2 Evidences when they have assessed the impact of sharing their own knowledge on: a. Their development b. Colleague development
Ownership/responsibility 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*
Team working B3.1 Demonstrate sharing own knowledge and experience with others, to support colleague development.	*There are no distinction criteria for this component*

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Assessing the practical observation with Question and Answer

The end-point assessment plan states that the practical observation is to be covered in 1 session, lasting **60-minutes** 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.

While on-programme, the employer/training provider should discuss the areas that could be assessed as part of the practical observation with the apprentice.
Highfield recommends that the apprentice completes at least 1 mock assessment of both the practical observation and the questioning.
The employer/training provider should encourage and guide the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the criteria.

The observation needs to take place in the apprentice's normal place of work.
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 apprentice should be prepared to **provide clarification** to the end-point assessor in the observation as to their actions and the rationale behind them.

The independent assessor will plan the practical observation in agreement with the apprentice and their employer, taking account of any workplace considerations.
These considerations would typically include:

- timings
- ensuring the correct environment
- ensuring there is sufficient space to allow the apprentice to work

Question and answer
The end-point assessor will question the apprentice to clarify their knowledge and understanding is being applied correctly throughout the observation.

The end-point assessors can ask supplementary questions, as required, to seek further clarification. The amount of questioning time carried out during the observation should not exceed **9 minutes** (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 the assessment of the overall competence
- be carried out on a one-to-one basis

Practical observation with Question and Answer grading

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages. Apprentices need to achieve **all pass criteria** to be awarded a pass and all pass and **all distinction** criteria to be awarded a distinction.

Practical observation with Question-and-Answer 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 and experiences the mock questioning in preparation for the real thing.

The most appropriate form of mock assessment will depend on the resources available to the employer/training provider.

When designing a mock assessment, the employer/training provider should consider the following elements.

- The mock observation should take place in a real workplace or a realistic simulation if the real workplace does not present all the required assessment opportunities.
- 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.
- A **60-minute (+/- 10%)** time slot should be available for the complete practical observation, if it is intended to be a complete mock observation covering all relevant standards. This time can be split up to allow for progressive learning with the apprentice.
- Video recording of the mock assessment and/or allowing it to be observed by other apprentices. This may be necessary for employers/training providers if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice.
- The apprentice's performance should be assessed by a competent trainer/assessor.
- Feedback should be shared with the apprentice to complete the learning experience. The mock assessment sheets found as a separate download may be used for this purpose.

Practical observation with Question-and-Answer criteria

Pass criteria	*Distinction criteria*
Knowing your customers and their needs/customer insight K3.3 Demonstrate how they analyse, use and present a range of information in order to provide customer insight. K3.4 An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them. K3.5 Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.	*There are no distinction criteria for this component*
Customer service culture and environment awareness 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*
Business-focused service delivery 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.*
Providing a positive customer experience S2.3 Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes. S2.4 Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction. S2.5 Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures. S2.6 Recognises when customer emotions have been affected by the level of service offered. S2.7 Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.	S2.8 *Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.*

Customer service performance 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.	*There are no distinction criteria for this component*
Ownership/responsibility 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*
Teamworking B3.2 Demonstrates achievement of results through effective teamwork and collaboration with colleagues at all levels. B3.3 Shows adaptability of own skills when working with internal customers.	*There are no distinction criteria for this component*
Equality B4.1 Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types. B4.2 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*
Presentation 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.	*There are no distinction criteria for this component*

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