

Highfield Level 2 End-Point Assessment for ST0072 Customer Service Practitioner

End-Point Assessment Kit



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EPA Kit

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How to use this EPA kit

Welcome to the Highfield end-point assessment kit for the Level 2 Customer Service Practitioner Apprenticeship Standard.

Highfield is an independent end-point assessment organisation that has been approved to offer and carry out the independent end-point assessments for the Level 2 Customer Service Practitioner Apprenticeship Standard. Highfield internally quality assures all end-point assessments in accordance with its 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 offers the Highfield Customer Service Practitioner 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 Practitioner end-point assessment.

Key facts

Apprenticeship standard:	Customer Service Practitioner
Level:	2
On Programme Duration:	Minimum of 12 months
Grading:	Pass/distinction
End-Point Assessment methods:	Apprentice showcase, practical observation, professional discussion

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 role of a customer service practitioner is to deliver high quality products and services to their organisation's customers. Your core responsibility will be to provide a high-quality service to customers that will be delivered from the workplace, digitally or through going to the customer's own locality. These may be one-off or routine contacts and include dealing with orders, payments, offering advice, guidance and support, meet-and-greet, sales, fixing problems, aftercare, service recovery or gaining insight through measuring customer satisfaction. You may be the first point of contact and work in any sector or organisation type.

Your actions will influence the customer experience and their satisfaction with your organisation. You will demonstrate excellent customer service skills and behaviours as well as product and/or service knowledge when delivering to your customers. You provide service in line with the organisation's customer service standards and strategy and within appropriate regulatory requirements. Your customer interactions may cover a wide range of situations and can include face to face, telephone, post, email, text and social media.

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 completed in no less than 12 months. The apprentice may start the end-point assessment at the earliest after 12 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. Together, they should agree on how any issues are to be resolved.
- apprentices may develop and maintain examples of their work throughout their apprenticeship that cover the full standard. This could be in the form of a portfolio or other tracking method to be reviewed on-programme at intervals agreed by the employer and training provider, for example, at 3, 6 and 9 months.

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 2 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:

- they must have achieved level 1 English and maths.
- the line manager (employer) must be confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard and that the apprentice is competent in performing their role. 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 the end-assessment window. The assessment plan does not specify an assessment window for this standard. Highfield suggests a 3-month assessment window that starts from the attempt of the first activity.

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 professional discussion should take place after the practical observation. The apprentice showcase can take place at any point during the end-point assessment period.

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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 (2016)

<https://www.instituteforapprenticeships.org/apprenticeship-standards/customer-service-practitioner-v1-1>

End-point assessment plan (2018 ST0072/AP02)

https://www.instituteforapprenticeships.org/media/1166/customer_service_practitioner.pdf

Specific considerations

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

While there is no timing stated in the assessment plan, Highfield have taken the decision to impose a 90-minute time limit on apprentices as the assessment plan states this should be a minimum of 60-minutes in duration. This enables the apprentice to have an adequate amount of time to evidence the required KSBs.

During the practical observation, where possible, situations and evidence should be naturally occurring, however, in order to ensure that all criteria can be covered, some simulation will be allowed to ensure total coverage of the standards as set out in the practical observation. This simulation can be arranged before the assessment takes place to give the best opportunity for all criteria to be met, if the employer/training provider feels they are not likely to occur during the end-point observation.

Carry over of some criteria from the practical observation to the professional discussion will be allowed and this is covered in more depth later in this document. Criteria cannot be carried over if they have been attempted but not passed.

For the apprentice showcase, Highfield has set a recommended word and time limit as guidance for apprentices. The assessment plan allows for an interview to take place in order to delve deeper into the learning and experience of the apprentice, and Highfield have taken the decision to allow this with a time limit of 30 minutes (half of the required time for the professional discussion). This will be offered to all apprentices regardless of whether they choose the presentation or report option.

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 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:

- customer feedback
- recordings
- manager statements
- witness statements

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 1 English
- achieved Level 1 maths

Apprentices will have to confirm at gateway which method they wish to present their showcase to the assessor. This can either be a report or a presentation.

Apprentices should be advised by employers and providers to gather this evidence and undertake these qualifications during 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

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

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 Practitioner Apprenticeship Standard

The following pages contain the Level 2 Customer Service Practitioner Apprenticeship Standard and the assessment criteria in a format that is suitable for delivery.

Knowing your customers		
Professional discussion		
<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Understand who customers are	K1.1 Explain the difference between internal and external customers in the context of their organisation	K1.4 Explain the importance of building good customer relationships to the organisation K1.5 Explain the difference in the way internal and external customer relationships are managed
Understand the difference between internal and external customers		
Understand the different needs and priorities of your customers and the best way to manage their expectations, recognising and knowing how to adapt style to be highly effective	K1.2 Describe the specific needs of different customers, including those protected under current equality law K1.3 Explain when and how to adapt their service approach to meet the needs and expectations of customers	K1.6 Explain the importance of balancing the needs of both the organisation and its customers

Understanding the organisation

Apprentice showcase

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Know the purpose of the business and what 'brand promise' means	<p>K2.1 State the aims of the organisation in relation to its sector</p> <p>K2.2 State what is meant by the organisation's 'brand promise'</p>	K2.6 Explain how the organisational policies and procedures impact on the delivery of customer service
Know your organisation's core values and how they link to the service culture	K2.3 Explain how the organisation's core values relate to its service culture	
Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation	<p>K2.4 State the purpose of different organisational policies and procedures that affect their customer service role</p> <p>K2.5 Describe the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment</p>	

Amplification and guidance

- **Sector**
 - public, private or third sector (charity)
- **'Brand promise'**
 - a commitment or promise made between a company and its customers
- **Core values**
 - principles that guide an organisation's internal and external behaviour and conduct
- **Organisational policies and procedures**
 - an organisation's policies and procedures that are used internally

Meeting regulations and legislation

Apprentice showcase

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Know the appropriate legislation and regulatory requirements that affect your business	K3.1 Explain how the relevant legislation and regulations affect the organisation's customer service provision	K3.4 Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations K3.5 Explain how a code of practice or ethical standards affects customer service
Know your responsibility in relation to this and how to apply it when delivering service	K3.2 State their responsibilities for keeping information confidential in the organisation K3.3 State the responsibilities of employees and employers under the Health and Safety at Work Act	

Systems and resources

Apprentice showcase

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Know how to use systems, equipment and technology to meet the needs of your customers	K4.1 Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively	<i>There are no distinction criteria for this component</i>
Understand types of measurement and evaluation tools available to monitor customer service levels	K4.2 Describe the measures and evaluation tools used in the organisation to monitor customer service levels	
Amplification and guidance		
<ul style="list-style-type: none"> • Measures and evaluation tools <ul style="list-style-type: none"> ○ methods or tools used to evaluate, measure and document 		

Your role and responsibility

Professional discussion

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Understand your roles and responsibilities within your organisation and the impact of your actions on others	K5.1 Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation	<i>There are no distinction criteria for this component</i>
Know the targets and goals you need to deliver against	K5.2 Describe how to achieve their agreed targets and goals	

Customer experience

Professional discussion

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Understand how establishing the facts enables you to create a customer-focused experience and appropriate response	K6.1 Explain how an understanding of the facts can be used to create a customer focused experience	<i>K6.3 Explain how to respond to customer needs and requirements positively</i>
Understand how to build trust with a customer and why this is important	K6.2 Explain how to build trust with customers and the importance of doing so	

Product and service knowledge

Apprentice showcase

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Understand the products or services that are available from your organisation and keep up to date	K7.1 Explain the difference between the features and benefits of products and/or services in relation to the organisation	K7.3 <i>Explain why it is important to update their knowledge on the organisation's products and/or services</i>
	K7.2 Describe how to maintain their knowledge of the organisation's products and/or services	
Amplification and guidance		
<ul style="list-style-type: none"> • Features and benefits <ul style="list-style-type: none"> ○ features - facts about products or services that add credibility and substance to your sales pitch ○ benefits - give customers a reason to buy because they explain how the product or service improves a customer's life 		

Interpersonal skills

Practical observation

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Use a range of questioning skills, including listening and responding in a way that builds rapport, determines customer needs and expectations and achieves positive engagement and delivery	S8.1 Demonstrate willingness and ability to engage with customers in a positive manner using relevant interpersonal skills	S8.4 <i>Demonstrate ability to adapt interpersonal skills when working on meeting the needs and expectations of different customers, showing knowledge of the application of the Equality Act when communicating (verbally or non-verbally)</i>
	S8.2 Work with customers to build a rapport, recognising and where possible meeting their needs and expectations	S8.5 <i>Demonstrate ability to balance the needs and expectations of the customer with that of the organisation</i>
	S8.3 Show willingness to work with others and share ideas where appropriate	S8.6 <i>Proactively work with others to ensure efficient customer service delivery</i>

Communication

Practical observation

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
<p>(Depending on your job role and work environment)</p> <p>Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications</p> <p>and/or</p> <p>Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions</p> <p>Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand</p>	<p>Face to face:</p> <p>S9.1 Demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills</p> <p>S9.2 Adapt tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations</p> <p>S9.3 Demonstrate ability to recognise when to summarise and the techniques to use</p> <p>Non- facing:</p> <p>S9.4 Demonstrate ability to make initial customer contact and make use of appropriate communication skills</p> <p>S9.5 Adapts tone and behaviour when necessary, recognising and confirming understanding of needs and expectations</p> <p>S9.6 Demonstrates ability to recognise and use reinforcement techniques during customer interactions</p>	<p>Both face to face and non-facing:</p> <p>S9.7 <i>Demonstrate ability to adapt communication - tone, behaviour and language - to different customers and their interactions, showing clear knowledge of the application of the Equality Act in all customer handling.</i></p> <p>S9.8 <i>Demonstrate ability to flex to various customer personalities, while remaining calm and in control where necessary. They will also demonstrate they know the organisational procedures to be followed in all communication and the importance to the brand/organisation of this requirement.</i></p>

Amplification and guidance
<ul style="list-style-type: none"> • Reinforcement techniques <ul style="list-style-type: none"> ○ something used to clear up customer confusion and help them understand • Customer personalities <ul style="list-style-type: none"> ○ e.g. an angry or an easy-going, relaxed customer

Influencing skills		
Apprentice showcase		
<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation	S10.1 Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation S10.2 Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs S10.3 Handle customer objections in a positive and professional manner	<i>S10.4 Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached</i>
Amplification and guidance		
<ul style="list-style-type: none"> • Clear and coherent manner <ul style="list-style-type: none"> ○ i.e. without the use of jargon 		

Personal organisation

Apprentice showcase

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines	<p>S11.1 Prioritise and plan the completion of tasks according to agreed deadlines</p> <p>S11.2 Use appropriate tools and techniques to monitor the progress of tasks completion</p>	<p><i>S11.3 Respond in a professional manner to challenges and changes and adjust priorities accordingly</i></p>

Dealing with customer conflict and challenge

Apprentice showcase

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Demonstrate patience and calmness	S12.1 Maintain calm and patient at all times when dealing with challenging customer situations	<i>S12.7 Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.</i>
Show you understand the customer's point of view	S12.2 Demonstrate sensitivity to, and interest in, the customers' concerns	
Use appropriate signposting or resolution to meet your customers' needs and manage expectations	S12.3 Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers	
	S12.4 Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures	
Maintain informative communication during service recovery	S12.5 Keep customers informed of progress while resolving issues	
	S12.6 Maintain accurate record of customer issues and progress to resolution	

Amplification and guidance

- **Clear and coherent manner**
 - i.e. without the use of jargon

Developing self

Apprentice showcase

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Take ownership for keeping your service knowledge and skills up to date	B13.1 Conduct a self-assessment to identify their strengths and weaknesses in relation to the job role	<i>B13.3 Review the effectiveness of their personal development plan and update it accordingly</i>
Consider personal goals and propose development that would help achieve them	B13.2 Produce a personal development plan to support the achievement of their agreed learning and development goals	
Amplification and guidance		
<ul style="list-style-type: none"> • Personal development plan <ul style="list-style-type: none"> ○ a description of strengths and weaknesses, goals, reflection and planning regarding self-improvement within the organisation 		

Being open to feedback

Apprentice showcase

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Act on and seek feedback from others to develop or maintain personal service skills and knowledge	B14.1 Seek constructive feedback about their customer service skills and knowledge from others B14.2 Use feedback from others to develop their customer service skills and knowledge	<i>There are no distinction criteria for this component</i>
Amplification and guidance		
<ul style="list-style-type: none"> • Constructive feedback <ul style="list-style-type: none"> ○ can be positive or negative 		

Team working

Apprentice showcase

<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Frequently and consistently communicate and work with others in the interest of helping customers efficiently	<p>B15.1 Work with others in a positive and productive manner</p> <p>B15.2 Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently</p>	<i>B15.4 Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers</i>
Share personal learning and case studies with others, presenting recommendations and improvement to support good practice	B15.3 Share personal learning and information with others to support good customer service practice	<i>B15.5 Present reasoned ideas for improving customer service practice to the appropriate colleagues</i>
Amplification and guidance		
<ul style="list-style-type: none"> • Productive manner <ul style="list-style-type: none"> ○ working in a way that ensures the desired result is achieved 		

Equality – treating all customers as individuals

Practical observation		
<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Treat customers as individuals to provide a personalised customer service experience	B16.1 Recognise and respond to individual needs to provide a personalised customer service experience	<i>There are no distinction criteria for this component</i>
Uphold the organisation’s core values and service culture through your actions	B16.2 Behave in a way that upholds the core values and service culture of the organisation	
Amplification and guidance		
<ul style="list-style-type: none"> • A personalised customer service experience <ul style="list-style-type: none"> ○ treating the customers as individuals (to make them feel special) • Core values <ul style="list-style-type: none"> ○ guiding principles that dictate behaviour and action • Service culture <ul style="list-style-type: none"> ○ how the business the candidate works for does things 		

Presentation – dress code, professional language

Practical observation		
<i>The apprentice will</i>	<i>Pass criteria</i>	<i>Distinction criteria</i>
Demonstrate professional pride in the job through appropriate dress and positive and confident language	B17.1 Face to face: Present a professional image in line with the organisational dress code and code of conduct <p style="text-align: center;">Or</p> Non-facing: Demonstrate a positive attitude and welcoming approach consistently when dealing with customers B17.2 Maintain professional and positive language consistently in customer interactions	<i>There are no distinction criteria for this component</i>
Amplification and guidance		
<ul style="list-style-type: none"> • Dress code <ul style="list-style-type: none"> ○ e.g. mandatory clothing required for work or a uniform • Code of conduct <ul style="list-style-type: none"> ○ rules set out by an organisation 		

Right first time		
Practical observation		
<i>The apprentice will</i>	<i>Pass Criteria</i>	<i>Distinction Criteria</i>
Use communication behaviours that establish clearly what each customer requires and manage their expectations	<p>B18.1 Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging</p> <p>B18.2 They will show an ability to establish needs and expectations, working towards meeting them where possible, explaining when necessary when they cannot be met</p> <p>B18.3 Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures</p>	<i>There are no distinction criteria for this component</i>
Take ownership from the first contact and then take responsibility for fulfilling your promise	<p>B18.4 Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers</p> <p>B18.5 Take ownership from beginning to end, building and maintaining a relationship with the customer</p> <p>B18.6 Recognise the importance of good customer service to the customer and in turn the organisation, making contact as promised, referring to others as necessary with all required detail, following up to ensure conclusion</p>	
Amplification and guidance		
<ul style="list-style-type: none"> • Level of authority <ul style="list-style-type: none"> ○ what the candidate can deal with and what will need to be referred to management etc. 		

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Assessment summary

The end-point assessment for the Customer Service Practitioner Apprenticeship Standard is made up of 3 components:

1. Apprentice showcase including a 30-minute interview
2. 90-minute observation
3. 60-minute professional discussion

The professional discussion should follow 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 component.

Apprentice showcase

In order to achieve a pass in the apprentice showcase:

- **all** pass criteria **must** be met

To achieve a distinction in the apprentice showcase:

- **all** pass criteria and at least 7 out of 10 of the distinction criteria **must** be met

Practical observation

In order to achieve a pass in the observation:

- **all** pass criteria **must** be met

To achieve a distinction in the observation:

- **all** pass criteria and at least 4 out of 5 distinction criteria **must** be met

Professional discussion

To achieve a pass in the professional discussion:

- **all** pass criteria **must** be met

To achieve a distinction in the professional discussion:

- **all** pass criteria and at least 3 out of 4 distinction criteria **must** be met

To achieve a **distinction** overall, a distinction **must** be achieved in all 3 assessment components.

Retake and resit information

If an apprentice fails an end-point assessment method, it is up to the employer, provider and apprentice to decide whether a resit or retake should be attempted. If a **resit** is chosen, please call the Highfield scheduling team to arrange the resit. If a **retake** is chosen, the apprentice will require a period of further learning and will need to complete a retake checklist. Once this is completed, please call the Highfield scheduling team to arrange the retake.

When undertaking a resit or retake, the assessment method(s) will need to be re-attempted in full, regardless of any individual assessment criteria that were passed on any prior attempt. The EPA Report will contain feedback on areas for development and resit or retake guidance.

Apprentices who achieve a pass grade cannot resit or retake the EPA to achieve a higher grade.

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Assessing the apprentice showcase

The apprentice showcase should be compiled **after** 12 months of on-programme learning and should comprise work that is solely that of the apprentice. With guidance from the employer and/or training provider, the apprentice will select appropriate examples from their on-programme work to demonstrate the minimum requirements of certain standards.

The apprentice will present their showcase to the end-point assessor remotely or face to face. Their work can be either:

- a) Submitted as a written report. The written report is recommended to be a maximum of 4,500 words in length, excluding any annexes.
The report must be accompanied by the written submission sheet which is available to download from the Highfield Assessment website.
In addition, an interview lasting up to **30 minutes** for additional questioning by the assessor.
or
- b) A real-time presentation (either in person or by forms that allow audio recording) – recommended to be approximately **45 minutes** plus an interview lasting up to **30 minutes** for additional questioning by the assessor.

The apprentice can submit supplementary evidence within an appendix to accompany the showcase, which may include customer feedback, recordings, manager statements and witness testimonies. This supplementary evidence will not form part of the overall word count.

If the apprentice chooses to complete a written report for their showcase, this 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.

30-minute interview

As part of the showcase, all apprentices will be given the opportunity to expand on the criteria within an interview led by the end-point assessor. This interview will last up to 30 minutes and will provide the assessor with an opportunity to delve deeper into their learning and experience. This will also ensure the apprentice is given ample opportunity to evidence the required assessment criteria. Apprentices are permitted to bring their report or presentation slides with them to the interview. The interview for the showcase is likely to take place just before the professional discussion.

During the interview, the questions asked by the assessor will be open and will not lead the apprentice. This interview will centre around the criteria not already met by the apprentice in the showcase report/presentation or where criteria require further expansion.

Before the assessment

- Employers/training providers should brief the apprentice on the requirements of the apprentice showcase
- It is important that the apprentice knows in good time that they must produce an apprentice showcase, and that they have the opportunity to collect appropriate evidence (customer feedback, recordings, manager statements and witness statements as well as evidence from others, such as mid and end-of-year performance reviews, and feedback)
- Arrangements for confirming the authenticity of the apprentice showcase should be agreed and implemented
- In readiness for end-point assessment, the employer/training provider should give the apprentice the Highfield Apprentice Showcase Brief
- The apprentice should use the brief to guide them in pulling together their showcase, including the use of appropriate evidence gathered on-programme
- The apprentice should check that all the required evidence standards are covered, and that they are prepared to present the showcase to the end-point assessor
- In the case of the apprentice opting for a presentation, it is suggested that a trial run 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

Apprentice showcase brief and criteria

In this brief, apprentices are asked to carry out 3 tasks that will cover all the relevant parts of the standard. These tasks should be covered in 1 report or 1 presentation.

1. **Understanding your own organisation and what it does**
2. **Customer service essentials** - this covers the background knowledge and understanding of the systems, legislation and personal organisation necessary to be able to function in a customer service environment
3. **Customer service in action** - this is all about how the apprentice has dealt with customers and their expectations effectively

The apprentice has a choice as to how to approach the showcase; they can either:

- submit a 4500-word written report
- or**
- deliver a 45-minute presentation to the end-point assessor through a suitable format that can have an audio recording or be witnessed in person

Once the apprentice has chosen either the report or the presentation, they must keep that format of presenting throughout the showcase.

The apprentice may submit supplementary evidence within an appendix to accompany the showcase, which may include customer feedback, recordings, manager statements and witness testimonies. This supplementary evidence will **not** form part of the overall word count.

All apprentices will be given the opportunity to take part in a 30-minute interview led by the end-point assessor. This interview will centre around the criteria not met by the apprentice in the showcase report/presentation or where criteria require further expansion. Apprentices are permitted to bring their report or presentation slides with them to the interview.

Apprentices will be assessed against the pass and distinction criteria included in the tables on the following pages. Apprentices meeting **all** pass criteria will be awarded a pass. If 7 out of 10 distinction criteria are also met, the result will be a distinction.

The following pages contain the tasks the apprentice will be required to meet in either the report or presentation. Highfield has provided an example structure at the end of this section, including a recommended word count.

Apprentice showcase criteria

Task 1

Understanding your organisation and what it does	
Report	Presentation
To pass this task, you must meet the criteria contained within the following pages	
<p>Produce a report or presentation that describes your organisation and what it does. You should include knowledge of your organisation and the products and services it offers by covering:</p> <ul style="list-style-type: none"> - the aims of the organisation - the organisation's brand promise - the organisation's core values and service culture - the policies and procedures that affect your customer service role - the social media policy - the features and benefits of products and services - how you maintain your knowledge of products and services 	

<i>Pass criteria</i>	<i>Distinction criteria</i>
<p>Understanding the organisation</p> <p>K2.1 State the aims of the organisation in relation to its sector</p> <p>K2.2 State what is meant by the organisation's 'brand promise'</p> <p>K2.3 Explain how the organisation's core values relate to its service culture</p> <p>K2.4 State the purpose of different organisational policies and procedures that affect their customer service role</p> <p>K2.5 Describe the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment</p>	<p>K2.6 Explain how the organisational policies and procedures impact on the delivery of customer service</p>
<p>Product and service knowledge</p> <p>K7.1 Explain the difference between the features and benefits of products and/or services in relation to the organisation</p> <p>K7.2 Describe how to maintain their knowledge of the organisation's products and/or services</p>	<p>K7.3 Explain why it is important to update their knowledge on the organisation's products and/or services.</p>

Task 2

Customer service essentials	
Report	Presentation
To pass this task, you must meet the criteria contained within the following pages	
<p>Produce a report or presentation that describes how you organise yourself in your customer service role. You should undertake research into the regulation and legislation relevant to your own role and organisation, and the systems and technology you use.</p> <p>Your showcase should cover:</p> <ul style="list-style-type: none"> - legislation and regulation - technology and systems - planning and prioritising tasks - confidentiality - health and safety 	

<i>Assessment criteria</i>	<i>Distinction criteria</i>
<p>Meeting regulations and legislation</p> <p>K3.1 Explain how the relevant legislation and regulations affect the organisation's customer service provision</p> <p>K3.2 State their responsibilities for keeping information confidential in the organisation</p> <p>K3.3 State the responsibilities of employees and employers under the Health and Safety at Work Act</p>	<p>K3.4 Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations</p> <p>K3.5 Explain how a code of practice or ethical standards affects customer service</p>
<p>Systems and resources</p> <p>K4.1 Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively</p> <p>K4.2 Describe the measures and evaluation tools used in the organisation to monitor customer service levels</p>	<p><i>There are no distinction criteria for this component</i></p>
<p>Personal organisation</p> <p>S11.1 Prioritise and plan the completion of tasks according to agreed deadlines</p> <p>S11.2 Use appropriate tools and techniques to monitor the progress of tasks completion</p>	<p>S11.3 Respond in a professional manner to challenges and changes and adjust priorities accordingly</p>

Task 3

Customer service in action	
Report	Presentation
To pass this task, you must meet the criteria contained within the following pages	
Produce a report or presentation covering real examples of how you conduct yourself within your customer service role. Within your showcase you should provide examples of: <ul style="list-style-type: none"> - how to influence others - dealing with customer conflict and challenge - how to develop yourself - being open to feedback - working in a team 	

<i>Pass criteria</i>	<i>Distinction criteria</i>
Influencing skills S10.1 Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation S10.2 Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs S10.3 Handle customer objections in a positive and professional manner	S10.4 Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached
Dealing with customer conflict and challenge S12.1 Maintain calm and patient at all times when dealing with challenging customer situations S12.2 Demonstrate sensitivity to, and interest in, the customers' concerns S12.3 Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers S12.4 Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures S12.5 Keep customers informed of progress while resolving issues S12.6 Maintain accurate record of customer issues and progress to resolution	S12.7 Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met
Developing self B13.1 Conduct a self-assessment to identify their strengths and weaknesses in relation to the job role B13.2 Produce a personal development plan to support the achievement of their agreed learning and development goals	B13.3 Review the effectiveness of their personal development plan and update it accordingly

<p>Being open to feedback</p> <p>B14.1 Seek constructive feedback about their customer service skills and knowledge from others</p> <p>B14.2 Use feedback from others to develop their customer service skills and knowledge (include examples of how you have sought and used feedback)</p>	<p><i>There are no distinction criteria for this component</i></p>
<p>Team working</p> <p>B15.1 Work with others in a positive and productive manner</p> <p>B15.2 Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently</p> <p>B15.3 Share personal learning and information with others to support good customer service practice</p>	<p>B15.4 Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers</p> <p>B15.5 Present reasoned ideas for improving customer service practice to the appropriate colleagues</p>

Sample report format

Customer Service Practitioner Apprentice Showcase

Name:

Date of Birth:

Employer:

Task 1 - Understanding your organisation and what it does

The aims of the organisation

- Approximately 100-150 words

The organisation's brand promise

- Approximately 100-150 words

The organisation's core values and service culture

- Approximately 100-150 words

The policies and procedures that affect your customer service role

- Approximately 150-200 words

The social media policy

- Approximately 50-100 words

Features and benefits of products and services

- Approximately 150-200 words

How you maintain your knowledge or products and services

- Approximately 100-150 words

Task 2 - Customer service essentials**Legislation and regulation**

- Approximately 300 words

Technology and systems

- Approximately 200-300 words

Planning and prioritising tasks

- Approximately 200-300 words

Confidentiality

- Approximately 200-250 words

Health and safety

- Approximately 150-250 words

Task 3 - Customer service in action**How to influence others**

- Approximately 400 words

Dealing with customer conflict and challenge

- Approximately 400 words

How to develop yourself

- Approximately 400 words

Being open to feedback

- Approximately 400 words

Working in a team

- Approximately 400 words

Appendix

Any supporting evidence or examples of:

- customer feedback
- manager statements
- witness testimonies
- emails
- letters
- feedback

Sample presentation format

Customer Service Practitioner Apprentice Showcase

Name:

Date of Birth:

Employer:

Task 1 - Understanding your organisation and what it does

Approximately 10 minutes

Slide 1

The aims of the organisation

Slide 2

The organisation's brand promise

Slide 3

The organisation's core values and service culture

Slide 4

The policies and procedures that affect your customer service role

Slide 5

The social media policy

Slide 6

Features and benefits of products and services

Slide 7

How you maintain your knowledge or products and services

Task 2 - Customer service essentials

Approximately 15 minutes

Slide 8

Legislation and regulation

Slide 9

Technology and systems

Slide 10

Planning and prioritising tasks

Slide 11

Confidentiality

Slide 12

Health and safety

Task 3 - Customer service in action

Approximately 20 minutes

Slide 13

How to influence others

Slide 14

Dealing with customer conflict and challenge

Slide 15

How to develop yourself

Slide 16

Being open to feedback

Slide 17

Working in a team

Appendix

Slide 18

Any supporting evidence or examples of:

- customer feedback
- manager statements
- witness testimonies
- emails
- letters
- feedback

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Assessing the practical observation

The end-point assessment plan states that the practical observation should be no longer than 90 minutes, will be pre-planned, and scheduled at a time when the apprentice will be in their normal place of work.

The end-point assessor and will carry out the practical observation that should enable the apprentice to evidence their skills, knowledge and behaviour from across these standards to demonstrate genuine and demanding work objectives.

During the practical observation, where possible, situations and evidence such as customer interactions should be naturally occurring, however, to ensure that all criteria can be covered, some simulation will be allowed to ensure total coverage of the standards. This can be arranged before the assessment takes place to give the best opportunity for all criteria to be met. It is recommended that employers/training providers ensure that customers are available during the assessment so that simulation is not required.

Where it is not possible for the apprentice to evidence the criteria available due to a situation not arising, the criteria may be carried over to the professional discussion. Criteria **cannot** be carried over if they have been attempted but not passed.

Before the assessment

- Employers/training providers should plan a relevant observation activity, or series of activities, that provide the apprentice with the opportunity to demonstrate each of the required standards outlined in the following pages. The practical observation activities should provide the apprentice with opportunities to:
 - show direct customer contact
 - show contact with team members
 - make decisions

Employers/training providers should:

- ensure the apprentice knows the date and location of the assessment
- ensure that the assessment schedule information is available and up to date and that all necessary rooms and resources are booked
- brief the apprentice on the activities to be carried out and the duration of the assessment (90 minutes)
- ensure the apprentice knows which customer service practitioner standards 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

It is suggested that a mock observation is carried out by the apprentice in advance of the EPA with the training provider/employer giving feedback on any areas for improvement.

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages. Apprentices need to meet **all pass criteria** to be awarded a pass, and all pass and 4 of the 5 distinction criteria to be awarded a distinction.

If the apprentice fails the practical observation, Highfield will offer a resit of this assessment component along with an additional professional discussion follow-up of 30 minutes if a suitable situation to evidence the criteria did not occur.

Practical observation mock assessment

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that they experience a mock observation in preparation for the real thing. The most appropriate form of mock 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 their planning:

- 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
- It is recommended that employers/training providers ensure that customers are available during the assessment
- it is strongly recommended that the mock observation has been practised beforehand and all personnel involved are properly briefed on their roles
- the roles should provide the opportunity for the apprentice to demonstrate both the 'pass' level and the 'distinction' level criteria
- a 90-minute time slot should be available for the complete observation, if it is intended to be a complete mock observation covering all relevant standards, however, this time may be split up to allow for progressive learning
- consider a video recording of the mock and allow the mock to be observed by other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock 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 90 minutes should involve the apprentice dealing with customers as part of their normal duties and should cover:

Area of the standard	Face to face	Non-facing
Interpersonal skills	Willingness to engage with a customer as well as rapport building	
Communication	Confidence in approaching and communication with customers using appropriate body language and summarising	Using appropriate communication skills to make initial customer contact and adapting tone and behaviour, when necessary
Equality – treating all customers as individuals	Recognising and responding to individual needs while upholding the core values and service culture of the organisation	
Presentation – dress code, professional language	Being appropriately dressed/presented for the role in line with organisational dress code and code of conduct	Demonstrating positive attitude and maintaining professional and positive language consistently
Right first time	Taking ownership and remaining confident during challenging situations	
Personal organisation	Prioritising, understanding and undertaking duties appropriately, effective time management and being prompt	

Practical observation criteria

Throughout the observation, which will last approximately 90 minutes, the following standards should be evidenced.

Interpersonal skills	
Assessment criteria	Distinction criteria
S8.1 Demonstrate willingness and ability to engage with customers in a positive manner using relevant interpersonal skills	S8.4 Demonstrate ability to adapt interpersonal skills when working on meeting the needs and expectations of different customers, showing knowledge of the application of the Equality Act when communicating (verbally or non-verbally)
S8.2 Work with customers to build a rapport, recognising and where possible meeting their needs and expectations	S8.5 Demonstrate ability to balance the needs and expectations of the customer with that of the organisation
S8.3 Show willingness to work with others and share ideas where appropriate	S8.6 Pro-actively work with others to ensure efficient customer service delivery

Communication	
Assessment criteria	Distinction criteria
S9.1 'Face to face' - demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills	S9.7 In all roles , demonstrate ability to adapt communication - tone, behaviour and language - to different customers and their interactions, showing clear knowledge of the application of the Equality Act in all customer handling.
S9.2 Adapt tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations	S9.8 In all roles , demonstrate ability to flex to various customer personalities, while remaining calm and in control where necessary. They will also demonstrate they know the organisational procedures to be followed in all communication and the importance to the
S9.3 Demonstrate ability to recognise when to summarise and the techniques to use	
S9.4 'Non-facing' - demonstrate ability to make initial customer contact and make use of appropriate communication skills	
S9.5 Adapts tone and behaviour when necessary, recognising and	

Communication	
Assessment criteria	Distinction criteria
S9.6 confirming understanding of needs and expectations Demonstrates ability to recognise and use reinforcement techniques during customer interactions	brand/organisation of this requirement.

Equality	
Assessment criteria	Distinction criteria
B16.1 Recognise and respond to individual needs to provide a personalised customer service experience B16.2 Behave in a way that upholds the core values and service culture of the organisation	<i>There are no distinction criteria for this component</i>

Presentation/dress code	
Assessment criteria	Distinction criteria
B17.1 Face to face: Present a professional image in line with the organisational dress code and code of conduct Or None facing: Demonstrate a positive attitude and welcoming approach consistently when dealing with customers B17.2 Maintain professional and positive language consistently in customer interactions	<i>There are no distinction criteria for this component</i>

Right first time	
Assessment criteria	Distinction criteria
B18.1 Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging B18.2 They will show an ability to establish needs and expectations, working towards meeting them where possible, explaining when	<i>There are no distinction criteria for this component</i>

Right first time	
Assessment criteria	Distinction criteria
necessary when they cannot be met	
B18.3 Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures	
B18.4 Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers	
B18.5 Take ownership from beginning to end, building and maintaining a relationship with the customer	
B18.6 Recognise the importance of good customer service to the customer and in turn the organisation, making contact as promised, referring to others as necessary with all required detail, following up to ensure conclusion	

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Assessing the professional discussion

The professional discussion will be a structured discussion between the apprentice and the end-point assessor. This will follow the observation in order to establish the apprentice's understanding and application of the set criteria of knowledge, skills and behaviours. The professional discussion can be used to pick up any criteria that were not evidenced during the observation due to a suitable situation not arising.

The professional discussion will need to take place in a suitable environment and should last for a **maximum of 1 hour**. The discussion will be against set criteria outlined in the following pages and it will be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence.

The purpose of the professional discussion is to clarify any questions the end-point assessor has for specified standards, and they will:

- confirm and validate judgements about the quality of work
- explore aspects of the work, including how it was carried out, in more detail
- ask questions in relation to personal development and reflection
- provide a basis for the end-point assessor to make a decision about the grade to be awarded

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages. Apprentices need to meet **all pass criteria** to be awarded a pass, and all pass and 3 of the 4 distinction criteria to be awarded a distinction.

Before the assessment:

Employers/training providers should:

- plan the professional discussion to allow the apprentice the opportunity to demonstrate each of the required standards
- 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

Professional discussion mock assessment

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

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

- a 1-hour time slot should be available for the complete professional discussion, if it is intended to be a complete mock assessment covering all relevant standards, however this time may be split up to allow for progressive learning
- consider an audio recording of the mock, and to allow the mock to be observed by other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock 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
- structured 'open' questions should be used as part of the professional discussion that do not lead the candidate but allows them to express their knowledge in a calm and comfortable manner; some examples of this may include the following:
 - knowing your customers
 - who are your internal and external customers and how do you ascertain the needs of certain customers and adapt your service approach?
 - your role and responsibility
 - how do you achieve agreed targets and goals?
 - customer experience
 - how can an understanding of the facts be used to create a customer-focused experience?

Professional discussion criteria

Throughout the 1-hour professional discussion, the assessor will review the apprentice's competence in all of the criteria outlined below.

Knowing your customers	
<i>Assessment criteria</i>	<i>Distinction criteria</i>
K1.1 Explain the difference between internal and external customers in the context of their organisation	K1.4 Explain the importance of building good customer relationships to the organisation
K1.2 Describe the specific needs of different customers, including those protected under current equality law	
K1.3 Explain when and how to adapt their service approach to meet the needs and expectations of customers	
	K1.5 Explain the difference in the way internal and external customer relationships are managed
	K1.6 Explain the importance of balancing the needs of both the organisation and its customers

Your role and responsibility	
<i>Assessment criteria</i>	<i>Distinction criteria</i>
K5.1 Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation	<i>There are no distinction criteria for this component</i>
K5.2 Describe how to achieve their agreed targets and goals	

Customer experience	
<i>Assessment criteria</i>	<i>Distinction criteria</i>
K6.1 Explain how an understanding of the facts can be used to create a customer focused experience	K6.3 Explain how to respond to customer needs and requirements positively
K6.2 Explain how to build trust with customers and the importance of doing so	

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