

Think about
Professional discussion (supported
by portfolio of evidence)
Level 3 ST0071 Customer Service
Specialist V1.0



On the day of this assessment you will carry out:



A 60-minute (+/- 10%) professional discussion
(supported by portfolio of evidence)



Remote or face-to-face



In a suitable controlled environment, free from
distraction and influence



With an end-point assessor



Key point

You will have already submitted your portfolio of evidence, which
is not formally assessed, but can be used to illustrate your answers.



Do

- ☐ Review the criteria associated with the professional discussion (supported by portfolio of evidence) - this can be found in the EPA Kit and in the table at the end of this document
- ☐ Ensure a quiet room is available and that there are no interruptions
- ☐ Be prepared to answer questions and any follow-up questions that your assessor may ask



Don't

- ☐ Forget to bring your ID
- ☐ Forget to plan
- ☐ Forget to bring your portfolio to refer to during the professional discussion



Next steps

- Results can take up to 7 working days to be confirmed
- Your manager or training provider will inform you of the results



Resits

- If you do not achieve a pass result on the professional discussion (supported by portfolio of evidence), you can resit the assessment



Use the table below to plan and prepare for the professional discussion (supported by portfolio of evidence).

(P) indicates pass criteria

(D) indicates distinction criteria

Assessment criteria	Key points to remember
Business knowledge and understanding	
(P) Ability to describe your role in meeting your organisation's customer service standards and its impact upon other departments	
(P) Evidence of how you identify the different types of leadership styles that work best in your customer environment	



Assessment criteria	Key points to remember
Customer journey knowledge	
(P) Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within your organisation	
(P) Ability to adhere to your organisations service level agreement and demonstrates an awareness of the limit of your authority when providing customer service	
Knowing your customers and their needs/customer	
(P) Evidence knowledge of how your internal and external customers' expectations can differ and how you would adapt your approach to meet those expectations	
(P) Demonstrate factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation	

Assessment criteria	Key points to remember
(D) Evidence when you have analysed the importance of your professional image and its relationship with the organisation's brand	
Customer service culture and environment awareness	
(P) Evidence knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development	
Providing a positive customer experience	
(P) Demonstrate when you have balanced the meeting of your customer and your organisation's needs while showing you have considered cost implications	

Assessment criteria	Key points to remember
Develop self	
(P) Provide evidence to demonstrate how you 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	
(D) Demonstrate how you evaluate and review improvements made to their own customer service to ensure a future-focused approach	
Ownership/responsibility	
(P) Demonstrate 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	

Assessment criteria	Key points to remember
Teamworking	
(P) Demonstrate sharing own knowledge and experience with others, to support colleague development	
(D) Evidence when you have assessed the impact of sharing their own knowledge on: a. Their development b. Colleague development	