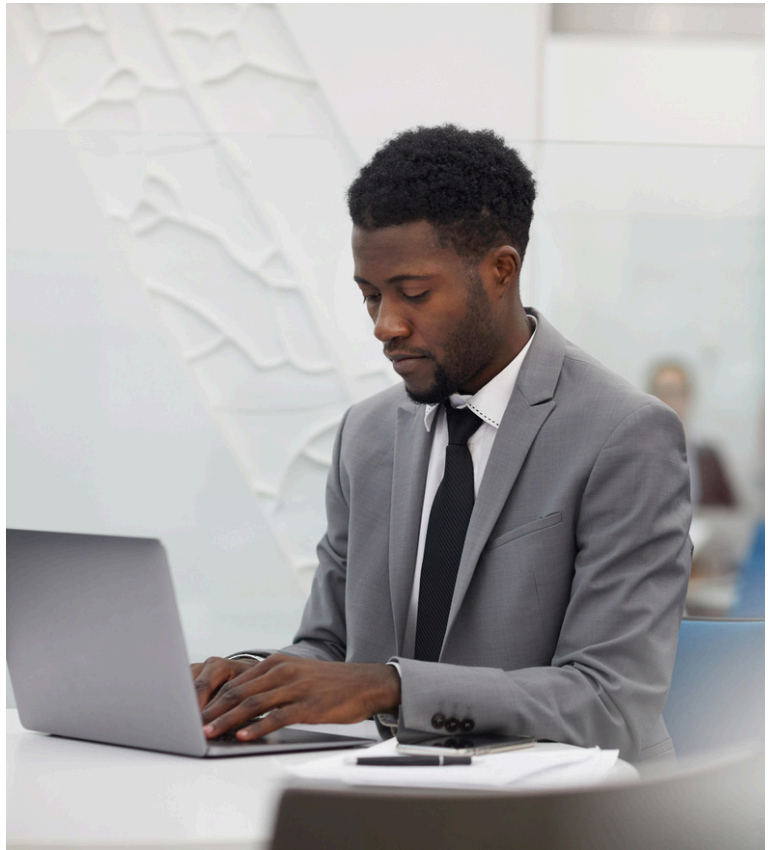


# Customer Service Specialist Level 3

**Apprenticeship Standard**



# Overview



The Customer Service Specialist acts as a referral point for dealing with more complex or technical customer requests, complaints, and queries. They are often an escalation point for complicated or ongoing customer problems. As an expert in their organisation's products and/or services, they share knowledge with their wider team and colleagues. They gather and analyse data and customer information that influences change and improvements in service, utilising both organisational and generic IT systems to carry out their role with an awareness of other digital technologies.

The Customer Service Specialist may work in a contact centre, retail outlet, service industry or any customer service point.

## **Duration:**

18 months + 3 months for the End Point Assessment

## **Entry Guidelines:**

English & maths at GCSE grade A\*-C/4-9 or Functional Skills level 2

*NB All apprenticeship standards require apprentices to provide evidence of their English and maths grades before they can progress through the Gateway to their End Point Assessment and achieve the apprenticeship qualification.*



# Customer Service Specialist Level 3

## Course Overview

Pre-programme	On Programme Learning covering Skills, Knowledge & Behaviours	Gateway	Independent End Point Assessment
Initial assessment English & Maths	Online learning , videos, research, assignments, projects	<ul style="list-style-type: none"> <li>English Level 2</li> <li>Maths Level 2</li> </ul>	<ul style="list-style-type: none"> <li>Practical Observation</li> </ul>
Skills Scan	e-portfolio of evidence to be developed during on programme learning	<ul style="list-style-type: none"> <li>E-Portfolio</li> </ul>	<ul style="list-style-type: none"> <li>Work Based Project &amp; Interview</li> </ul>
Induction with Trainer Assessor	On programme Assessments & Reviews: <ul style="list-style-type: none"> <li>6-8 weekly sessions with Trainer Assessor.</li> <li>8-10 weekly Progress Reviews with apprentice and employer.</li> </ul>		<ul style="list-style-type: none"> <li>Professional Discussion</li> </ul>

# Course Details

The **Knowledge** element is developed by tasks, research, project work, online learning, reading and/or other activities set by the Trainer Assessor. The qualification provides an ideal grounding should the apprentice wish to progress on to a Team Leader or Supervisor level 3 apprenticeship.

## Unit 1: Business Knowledge and Understanding

- Understand what continuous improvement means in a service environment and how recommendations for change impact the organisation.
- Understand the organisation's current business strategy in relation to customers and make recommendations for its future.
- Understand a range of leadership styles and apply them successfully in a customer service environment.

## Unit 2: Customer Journey Knowledge

- Understand and critically evaluate the possible journeys of customers, including challenges and the end-to-end experience.
- Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention.
- Understand commercial factors and authority limits for delivering the required customer experience.

## Unit 3: Knowing Customers and Their Needs

- Know the appropriate legislation and regulatory requirements that affect the business.
- Know own responsibility in relation to this and how to apply it when delivering service.

## Unit 4: Customer Service Culture and Environment Awareness

- Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how to deliver for customers.
- Understand the organisation's structure and 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.

# Skills & Behaviours

The **Skills & Behaviours** element of the apprenticeship is to be completed with support from a Trainer Assessor making periodic visits to the apprentice in the workplace. The Trainer Assessor will support and guide the apprentice to ensure that they are developing the skills and competency required in accordance with the apprenticeship standard. The apprentice will use the e-portfolio system called OneFile to build a portfolio of work throughout the development stage, which is a key component of End Point Assessment and demonstrates their occupational competency.

## Business-Focussed Service Delivery

- Demonstrate a continuous improvement and future focussed 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.

## Providing a Positive Customer Experience

- Through advanced questioning, listening and summarising, negotiate mutually beneficial outcomes.
- Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps.
- Demonstrate a cost-conscious mind-set when meeting customer and the business needs.

## Working with Customers / Customer Insights

- Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon them.
- Analyse customer types, to identify or anticipate their potential needs and expectations when providing services.

## Customer Service Performance

- Maintain a positive relationship even when unable to deliver the customer's expected outcome.
- When managing referrals or escalations, consider historical interactions and challenges to determine next steps.

## Service Improvement

- Analyse the end to end service experience, seeking input from others where required, supporting development of solutions.
- Make recommendations based on findings to enable improvement.
- Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice.

### The Behaviours Element of the Programme Includes:

- Develop self
- Ownership/Responsibility
- Team working
- Equality
- Presentation





# English & Maths

English and maths will be naturally embedded within this apprenticeship, a summary of which as follows:

## English

- Written assignments
- Reading articles
- Actively listening to others
- Communicating with a variety of individuals from a diverse range of backgrounds.

## Maths

- Time management
- Budgeting
- Data management that may be relevant to a variety of projects





# Gateway

Once the apprentice has completed all the required elements of the apprenticeship and their manager and Trainer Assessor agree that they are ready for the end point assessment, they will progress through the Gateway to undertake their end point assessment.

# End Point Assessment

The End Point Assessment must only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that means they have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s) but the decision must ultimately be made solely by the employer.

**End Point Assessment (EPA) normally takes 3 months to complete and consists of:**

- 1. Practical Observation with Questions & Answers**
- 2. Work based project, supported by an interview**
- 3. Professional discussion underpinned by your e-portfolio of evidence**

## **Assessment Method 1: Practical Observation with Questions & Answers**

The practical observation will be pre-planned and scheduled to when the apprentice will be in their normal place of work and will be carried out by the Independent Assessor. The observation should reflect typical working conditions and involve activities which allow the apprentice to demonstrate the full range of their knowledge, skills and behaviours required. During the observation the apprentice must show how they deal with and resolve 3 complex and challenging issues.

## **Assessment Method 2: Work Based Project, Supported by an Interview**

Apprentices must submit a written report on a project they have carried out, to their End Point Assessment Organisation 2 weeks prior to an interview date.

Key characteristics:

- The written report must be 2500 words (+/- 10%), excluding annexes.
- The subject should cover a specific high-level challenge (such as a complaint or difficult situation) that the apprentice has dealt with explaining what it was, what actions (planning and execution) they took, what solutions were offered, details of any recommendations made to change a policy or process and any feedback from the customer.
- The report should contain annexes that are attributable to the apprentice and the actions they took. Example evidence could be emails, letters, meeting notes, call logs, workflow documents or, feedback.
- The work-based project is completed within 2 months from the start of the end-point assessment period.

### **Interview to Support the Work Based Project**

- The work-based project will be supported by an interview with an independent assessor.



# End Point Assessment

## Assessment Method 3: Professional Discussion

The professional discussion will be a structured discussion of up to an hour between the apprentice and the independent assessor, to establish the apprentice's understanding and application of knowledge, skills and behaviours.

The portfolio of evidence will not be assessed, but will be used by the assessor to prepare the questioning for the professional discussion and by the apprentice to exemplify their responses to the questions.

The purpose of the professional discussion is to:

- confirm and validate judgements about the quality of work;
- explore aspects of the work, including how it was carried out, in more detail;
- discuss how the apprentice would behave in specific scenarios, should they not have occurred within the practical observation;
- ask questions in relation to personal development and reflection;
- provide a basis for the Independent Assessor to make a decision about the grade to be awarded.



# Grading & Progression



## Apprenticeship grading

The available grades for this apprenticeship programme are **Distinction, Pass or Fail**.

## Where can apprentices progress to?

On completion of your apprenticeship you will be to progress your career in Customer Service. You may choose to progress on to a Team Leader or Supervisor level 3 apprenticeship.





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