



LEVEL 3 END-POINT ASSESSMENT FOR CUSTOMER SERVICE SPECIALIST 603/7539/5

1. Introduction

Apprenticeship objective

The Customer service specialist apprenticeship standard has been designed by employers for professionals providing direct customer support within all sectors and organisation types.

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

2. Link to professional registration

Completion of this apprenticeship will lead to eligibility to join the Institute of Customer Service as an Individual member at Professional level. Should you choose to progress on a customer service career path, you may be eligible for further professional membership including management.

3. Entry requirements

There are no formal entry requirements including qualifications for apprentices selecting this apprenticeship standard. Employers and training providers must ensure that apprentices have the potential and opportunity to achieve the apprenticeship standard successfully. Apprentices do not need any prior knowledge, skills or understanding before starting the apprenticeship.



4. Qualification details

Regulator	The Office of Qualifications and Examinations Regulation, Ofqual
Type	End-point Assessment
Level	3
Operational Start date	17 th May 2021
Operational End date	31 st May 2024

5. Gateway

Apprentices must ensure they have met gateway requirements for this standard before booking end-point assessment. Apprentices are required to achieve the following mandated qualifications for this standard:

- + Level 2 English
- + Level 2 mathematics
- + Apprentices are required to complete a portfolio of evidence comprising a collection of the apprentices' best evidence gathered during the programme of learning to support the professional discussion.

Further details on the requirements for gateway can be found in the Gateway Requirements Policy. Evidence of these qualifications must be submitted to Achieve+Partners.

6. Duration

Typically, this apprenticeship will take 15 months to complete.

7. Order of end-point assessment

There is no fixed order to the assessments. However, it is recommended that the observation is carried out before the professional discussion.

8. Apprenticeship grading

The apprenticeship is graded fail, pass, distinction. Apprentices must achieve a minimum of a pass in each of the 3 components. Distinction apprentices must meet all the pass criteria and distinction criteria in each of the 3 components.





9. Re-sits

An apprentice can re-sit a component of their end-point assessment if they fail. It is expected that a period of further learning will need to be undertaken if the apprentice has to re-sit any part of the end-point assessment. Achieve+Partners can make exemptions to this ruling should reasons for the fail are deemed to be outside the control of the apprentice.

10. External Quality Assurance Organisation

The end-point assessment for Customer Service Specialist is regulated by The Office of Qualifications and Examinations Regulation, Ofqual.

11. End-Point Assessment (EPA) Methods

End-point assessment for this standard includes:

[Practical observation](#)

What are the requirements?	<p>The practical observation takes place over a maximum 1-hour period. It is carried out in the workplace.</p> <p>Apprentices must be observed by an independent assessor carrying out a set of key tasks, in which they will demonstrate the knowledge, skills and behaviours assigned to this assessment method.</p> <p>The observation will include questioning to clarify knowledge and understanding is being applied.</p>
Here are the ways we can help	<p>We provide a set of activities that need to be demonstrated during the observation that reflect the tasks that must be observed.</p> <p>We provide an online learning module that supports the preparation for the practical observation.</p> <p>We provide feedback against the grading criteria.</p>

[Work based project supported by an interview](#)

What are the requirements?	<p>The project takes place over a maximum 8-week period after the gateway period. Apprentices must submit a written report, on a project they have carried out.</p>
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The written report must be 2500 words (+/- 10%), excluding annexes. All work on the project will be undertaken following the Gateway process over a two-month period.

The interview will take place over 1-hour, and the apprentice will be asked 10 competency-based questions.

The interview will typically be carried out using live media such as Zoom or alternative media.

The questions will assess the knowledge, skills and behaviours assigned to this assessment method.

It can be taken in the workplace or at an assessment centre.

The project will cover knowledge, skills and behaviours assigned to this assessment method.

Here are the ways we can help

We provide support in identifying a suitable project subject.

We provide an online learning module that supports the preparation for the presentation and questioning.

We provide feedback against the grading criteria.

[Professional Discussion](#)

What are the requirements?

The professional discussion takes place over 1-hour.

The independent assessor will ask open competence-based questions, it will follow the practical observation.

During the professional discussion, evidence from the on-programme portfolio of evidence will be used as a base to support the professional discussion.

The apprentice will extract, from their portfolio, evidence which is suitable for supporting them in their professional discussion. This evidence will consist of a minimum of 10 pieces of evidence to a maximum of 15 pieces and related to the standards which apply to the professional discussion.

The professional discussion can be taken in the workplace, at an assessment centre or online.

The questions will assess the knowledge, skills and behaviours assigned to this assessment method.

Here are the ways we can help

We provide an online learning module that supports the preparation for the professional discussion.

We provide feedback against the grading criteria.



12. Requirements of the standard

Apprentices must demonstrate all of the knowledge, skills and behaviours listed in the standard.

Knowledge statements		Method
Business Knowledge and Understanding	Understand your organisation's current business strategy in relation to customers and make recommendation for its future.	WBP
	Understand the impact your service provision has on the wider organisation and the value it adds	PD
	Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation	WBP
	Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions	WBP
	Understand a range of leadership styles and apply them successfully in a customer service environment	PD
Customer Journey knowledge	Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience	WBP
	Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention	PD
	Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation	WBP
	Understand commercial factors and authority limits for delivering the required customer experience	PD
Knowing your customers and their needs/Customer Insight	Know your internal and external customers and how their behaviour may require different approaches from you	PD
	How to analyse, use and present a range of information to provide customer insight	O
	Understand what drives loyalty, retention and satisfaction and how they impact on your organisation	PD
	Understand different customer types and the role of emotions in bringing about a successful outcome	O
	Understand how customer expectations can differ between cultures, ages and social profiles	O



Customer service culture and environment awareness	Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers	O
	Understand your business environment and culture and the position of customer service within it	WBP
	Understand your organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong	WBP
	Understand how to find and use industry best practice to enhance own knowledge	PD
Skills statements		Method
Business focused service delivery	Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice	WBP
	Resolve complex issues by being able to choose from and successfully apply a wide range of approaches	O
	Find solutions that meet your organisation's needs as well as the customer requirements	O
Providing a positive customer experience	Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes	O
	Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy	O
	Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps	O
	Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction	WBP
	Demonstrate a cost-conscious mind-set when meeting customer and the business needs	PD
	Identify where highs and lows of the customer journey produce a range of emotions in the customer	O
	Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format	O



Working with your customers / customer insights	Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it	WBP
	Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service	WBP
Customer service performance	Maintain a positive relationship even when you are unable to deliver the customer's expected outcome	O
	When managing referrals or escalations take into account historical interactions and challenges to determine next steps	O
Service improvement	Analyse the end to end service experience, seeking input from others where required supporting development of solutions	WBP
	Make recommendations based on your findings to enable improvement	WBP
	Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice	WBP
Behaviour statements		Method
Develop self	Proactively keep your service, industry and best practice knowledge and skills up-to-date	PD
	Consider personal goals related to service and take action towards achieving them	PD
Ownership / Responsibility	Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation	O
	Exercises proactivity and creativity when identifying solutions to customer and organisational issues	O
	Make realistic promises and deliver on them	PD
Team working	Work effectively and collaboratively with colleagues at all levels to achieve results	O
	Recognise colleagues as internal customers	O
	Share knowledge and experience with others to support colleague development	PD



Equality	Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer	O
	Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment	O
Presentation	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction	O
	Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand	O

Key

- WBP Work based project
- O Practical observation
- PD Professional discussion