



As of 1 August 2022, the English and maths requirements for on-programme and new apprentices undertaking level 2 apprenticeships have changed and are detailed as part of the [apprenticeship funding rules](#). These requirements supersede the current wording in this apprenticeship standard and EPA plan.

# CUSTOMER SERVICE PRACTITIONER LEVEL 2

## Assessment Plan

17<sup>th</sup> January 2017

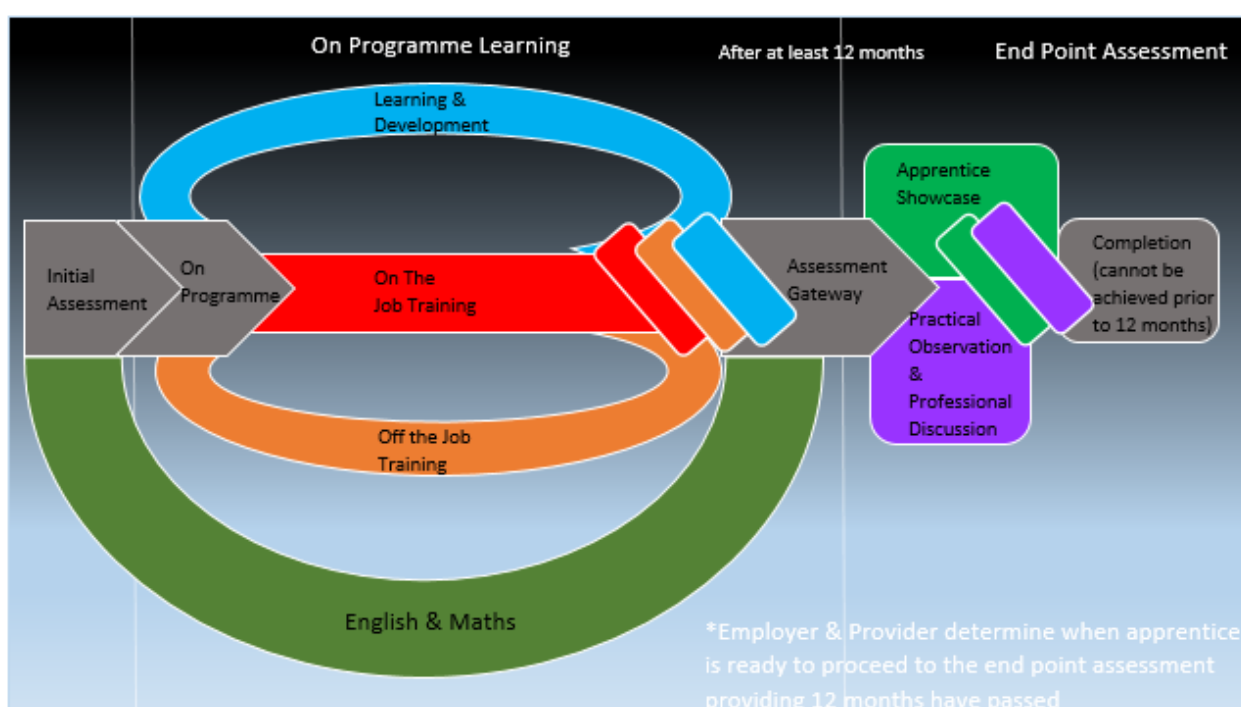
## Assessment Plan: Customer Service Practitioner (Level 2)

### 1. Introduction

This document sets out the requirements and process for the end point assessment of the Customer Service Practitioner Level 2 apprenticeship. It is designed for employers, apprentices, training providers and assessment organisations.

### 2. Summary of Assessment

This should be read in conjunction with the standards. The whole programme will be completed in no less than 12 months. In agreement with the apprentice, employer and provider, the apprentice may start the end point assessment at the earliest after 12 months on programme.



### 3. On-Programme Learning

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 prior to the minimum of 12 months after which end-point assessment will take place.

Employers should work closely with any training provider to plan and deliver support and training appropriately. This working closely will add value to the employer as it centres on real work competencies demonstrated in a real work environment.

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.
- Training providers may support ensuring the requirements of the apprenticeship standard are reflected in the above processes, and by filling any gaps through their work with apprentices.
- Employers and training providers could carry out joint reviews of progress at regular intervals, involving apprentices, line managers and others with a direct relationship, e.g. mentors, workplace coaches, etc. They should agree how any issues are to be resolved together.
- 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.

#### 4. Assessment Gateway

The end point assessment is synoptic and takes place at the end of the apprentice's learning and development, after a minimum of 12 month's on programme learning.

The employer, and, if appropriate in conjunction with the Training Provider, will formally sign-off that the apprentice has met the minimum requirements in regards to knowledge, skills and behaviours within the standard and confirm they are ready to move on to the end assessment. This will happen during a meeting involving the apprentice, their line manager and the trainer.

#### 5. End Point Assessment

For each of the three assessment methods, all pass criteria (100%) must be achieved to progress and complete the apprenticeship programme, as outlined below and identified in Annex A.

For a distinction to be awarded, apprentices must also achieve a distinction in each assessment method, as outlined below and identified in Annex A.

Assessment Method	Weighting	Duration	To achieve a pass	To achieve a Distinction
Apprentice Showcase	65%	After a minimum of 12 months on-programme learning	100%	You must meet all of the pass criteria <b>AND</b> 70% of the distinction criteria
Practical Observation	20%	Minimum of 1 hour	100%	You must meet all of the pass criteria <b>AND</b> 80% of the distinction criteria
Professional Discussion	15%	1 hour	100%	You must meet all of the pass criteria <b>AND</b> 75% of the

				distinction criteria
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## Apprentice Showcase

The apprentice showcase is compiled after 12 months of on-programme learning. The Apprentice Showcase enables apprentices to reflect and present examples of their development over the whole on-programme period. With guidance from the employer and/or training provider the apprentice will select appropriate evidence from the on programme portfolio to demonstrate the minimum requirements of the standard at the final stage of the programme as an 'Apprentice Showcase'. This will attest to professional competence at the level.

The apprentice showcase will be reviewed and assessed by the independent assessor. The evidence contained in the apprentice showcase will be assessed against the following areas of the standard as highlighted in Appendix A:

- Understanding the organisation
- Meeting regulations and legislation
- Systems and resources
- Product and service knowledge
- Influencing skills
- Personal organisation
- Dealing with customer conflict and challenge
- Developing self
- Being open to feedback
- Team working

Employers within the sector have strongly expressed that end point assessment methods should be flexible, and where possible delivered virtually due to the impact of *demand fluctuation* on the quality of *customer service within the sector*. The apprentice showcase, as agreed by the employer and apprentice with the assessment organisation, can therefore be assessed face to face or remotely. It can be showcased by the learner through the delivery of a presentation or by a virtual form of assessment such as submission of a report, storyboard, journal etc to the assessment organisation.

The apprentice showcase will be assessed against an externally set brief, written by the assessment organisation, working with Employers and other stakeholders, as appropriate, to ensure consistency.

It is expected that the externally set brief will include elements such as work-based evidence, including customer feedback, recordings, manager statements, and witness statements. It will also include evidence from others, such as mid-and-end of year performance reviews, and feedback. It is important to acknowledge that the employer and training provider will work together throughout the on-programme learning, ensuring all learning is consistently applied throughout the Apprenticeship and not just at the End Point Assessment or in the Apprentice Showcase. The apprentice will then present to the Independent Assessor to provide an opportunity for them to interview the apprentice and delve deeper in to the learning and experience. This is to ensure rigor, competence and independence.

## Practical Observation & Professional Discussion

The practical observation and professional discussion provides the opportunity for substantial synoptic assessment across the standard and must include customer interaction.

### Practical Observation

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 enable the apprentice to evidence their skills, knowledge and behaviour from across the standard to demonstrate genuine and demanding work objectives. Each situation within the observation will be different, and examples are, handling a general enquiry, dealing with a customer complaint or a need for further information or detail, but it is mandatory that the observation covers as a minimum: presentation, equality, interpersonal skills, communication and personal organisation. Those areas of the standard which are not able to be evidenced during the observation will be discussed subsequently as part of the professional discussion with the Independent Assessor.

### Professional Discussion

The professional discussion will be a structured discussion between the apprentice and the Independent Assessor, following the observation, to establish the apprentice's understanding and application of knowledge, skills and behaviours. The professional discussion will need to take place in a suitable environment and should last for a maximum of one hour. The discussion will be against set criteria in the occupational brief to ensure standardisation and consistency. It will be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence. Please see Appendix A at the end of this Assessment plan for the Occupational brief.

The purpose of the professional discussion is to:

- clarify any questions the Independent Assessor has from their assessment of the learner journey and practical observation;
- 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.

The Independent Assessor will plan the professional discussion in advance and in conjunction with the apprentice and employer. It will follow the occupational brief which will be subject to internal and external quality assurance, as described in section 9.

The professional discussion will be graded by the Independent Assessor based on the standard and grading criteria. Final judgement and the overall grade for the apprenticeship will be made by the Independent Assessor following completion of both the practical observation and professional discussion.

## 6. Independence

The assessment decisions need to be taken by Independent Assessors. To ensure consistent and reliable judgements the Independent Assessor must meet the following criteria:

- understanding of the customer service sector and of the role covered by the apprenticeship
- current occupational competence of 2 years or more
- no direct relationship with the apprentice
- hold or working towards a qualification to undertake assessment and verification activity (i.e. PGCE, Cert Ed or Assessor/Verifier qualifications) and/ or have significant knowledge and expertise in providing consistent and appropriate judgements of a candidate's skill and ability

## 7. Summary of roles and responsibilities

Assessor	Role
Employer	<ul style="list-style-type: none"> <li>• Brings a view of the apprentice working with them in the workplace through the apprenticeship</li> <li>• Works with the training provider to carry out a continuous review of the evidence generated by the apprentice as part of the on-programme assessment process</li> <li>• Supports 'on the job' training and offers relevant experience</li> <li>• Decides on the timing of final assessment with the support of the Training Provider</li> </ul>
Training Provider (This function could be undertaken by the Employer)	<ul style="list-style-type: none"> <li>• Brings a view of the apprentice from supporting them through the apprenticeship</li> <li>• Works collaboratively with the employer on the behaviours of the apprentice</li> <li>• Delivers 'off the job' training</li> <li>• Works with the employer and undertakes assessment of the apprentice against the standards as part of the on-programme assessment process</li> <li>• Supports the employer on deciding the timing of final assessment</li> </ul>
Independent Assessor	<ul style="list-style-type: none"> <li>• Provides an independent view as they will not have had any prior involvement with the apprentice</li> <li>• Brings added rigor and consistency to the assessment through their wider industry perspective, knowledge and experience</li> <li>• Assesses all components of the final end assessment independently using externally set marking/grading criteria</li> <li>• Participates in regular standardisation events</li> </ul>
Independent Assessment Organisation	<ul style="list-style-type: none"> <li>• Designs and offers the end assessments</li> <li>• Sources, allocates and manages the Independent Assessors</li> <li>• Runs standardisation events with Independent Assessors</li> <li>• Provides internal/external verification to ensure consistency of assessment decisions</li> </ul>

## 8. End-Point Grading

The apprenticeship includes Pass and Distinction grades which are applied at the end point assessment with the final grade based on the performance in the apprentice showcase, the practical observation and a professional discussion.

A pass apprentice will competently perform their role demonstrating application of the knowledge, skills and behaviours against the whole standard in line with organisation and regulatory requirements and ensuring customer satisfaction. At a minimum they must meet all criteria as set out in Annex A.

A distinction apprentice, in addition to meeting the pass criteria, will consistently perform above the required level for the role, please refer to Appendix A.

If any part of the assessment is not sufficient when first submitted, there will be an opportunity for resubmission, or observation or professional discussion to be repeated, however multiple assessment opportunities are not expected; all parties should be confident that the apprentice is ready to start the end point assessment with practice runs taking place before formal assessment is completed. Should the Apprentices fail any part of the end point assessment further development must be provided prior to a re-take. If the apprentice re-sits with no additional learning the individual employer will be responsible for bearing the cost.

The final grade will be based on the final end assessment. The apprentice must achieve the minimum pass threshold in each of the end assessment components and will be awarded a final grade based on the weighted average of these end assessment components.

## **9. Quality Assurance**

### **Internal Quality Assurance**

Approved Independent Assessment Bodies (IAB) must have in place a robust mechanism for internal quality assurance. This should include the ongoing monitoring and support of the independent assessment team, including regular standardisation meetings. Standardisation meetings should be undertaken annually to ensure the assessment system is consistent and reliable.

Internal quality assurance must be completed by an appropriately qualified person, and that person must not have been involved in any aspect of the delivery or assessment of the programme they are quality assuring.

Independent Assessment Organisations who wish to offer end point assessment against the standard will need to be on the Skills Funding Agency's Register of Apprentice Assessment Organisations (RoAAO).

### **External Quality Assurance:**

External Quality Assurance for the end point assessment for this apprenticeship standard will be delivered by Ofqual.

## **Implementation**

### **Affordability**

The cost and practicalities of the assessment have been key considerations in development of the assessment plan due to the range of businesses likely to deliver these apprenticeships. Both large and small employers alike must manage the apprenticeship process within organisations of varying sizes and the assessment needs to be affordable for venues housing small numbers of apprentices.

It is anticipated that the final end assessment costs will be approximately 10% of the total apprenticeship cost.

### Expected Starts

Expected Starts	16-18	19+
In the first academic year (Aug '15 to Jul '16)?	4,800	18,500
In the second academic year (Aug '16 to Jul '17)?	5,900	21,000
Per year once fully established?	7,000	25,000

### Manageability

Assessment tools will be refined in order to ensure the Apprenticeship Standard criteria are met in a reliable and valid way. We also hope this will encourage small and medium enterprise to take up apprenticeships and to ensure affordability across all employers.

### Delivering Consistent (Reliable) Judgements

At the core of ensuring that judgements on role competence are consistent will be the Apprenticeship Standard which defines what is required for each of the Knowledge, Skill and Behaviour areas to be assessed. In addition, Annex A, further expands on the requirements of each area.

Robust marking/grading schemes will be developed by the Independent Assessment Organisations that will be used by all Independent Assessors in the assessment of each of the end assessment components against the outcomes detailed in the Apprenticeship Standard. These will contain detailed guidance on what is required to achieve each assessment component, and what constitutes the different grades.

Consistency of approach by Independent Assessors will be achieved through recruitment, training and standardisation. This will cover an understanding of the overall apprenticeship; knowledge of the detailed standard; the grading standards; examples of relevant evidence and sample marking/grading exercises.



## Appendix A – Occupational Brief

Module	Standard	What do I need to KNOW	Pass Criteria	Distinction Criteria	Method of Assessment	
Knowing your customers	1. Understand who customers are	1.1 Who are my customers?	Explain the difference between internal and external customers in the context of their organisation.	Explain the importance of building good customer relationships to the organisation.	Professional Discussion	
		1.2 Who are the organisations customers?				
		1.3 Describe the different types of customers?				
	2. Understand the difference between internal and external customers	2.1 What is an internal customer?				
		2.2 What is an external customer?				
		2.3 Who are the organisations internal customers?				
		2.4 Who are the organisations external customers?				
		2.5 What is the difference between internal and external customers to the organisation?				
	3. 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	3.1 What is the purpose of customer service?		Describe the specific needs of different customers, including those protected under current Equality law.		Explain the importance of balancing the needs of both the organisation and its customers.
		3.2 What are the different needs of your customers?				
		3.3 What are the different priorities of your customers?				
		3.4 Identify the specific needs that customers may have, including those that are protected under current equality law?				
3.5 What is meant by customer expectations?		Explain when and how to adapt their service approach to meet the needs and expectations of customers.				
3.6 How does the standard of customer service affect the success of your organisation?						

		3.7 When do you adapt your service approach to meet the needs and expectations of your customers?	Explain when and how to adapt service approach to meet the needs and expectations of customers.		
		3.8 How you adapt your service approach to meet the needs and expectations of your customers?			
Module	Standard	What do I need to KNOW	Pass Criteria	Distinction Criteria	Method of Assessment
Understanding the organisation	1. Know the purpose of the business and what 'brand promise' means	1.1 What is the difference between public, private and third sector organisations?	State the aims of the organisation in relation to its sector.	Explain how the organisational policies and procedures impact on the delivery of customer service.	Apprentice Showcase
		1.2 What is your organisation business type and purpose?	State what is meant by the organisation's 'brand promise'.		
		1.3 What does 'brand promise' mean?			
	2. Know your organisation's core values and how they link to the service culture	2.1 What is meant by an organisations core values?	Explain how the organisation's core values relate to its service culture.		
		2.2 What are your organisations core values?			
		2.3 What is meant by service culture?			
		2.4 What is your organisations service culture?			
		2.5 How does your organisations core values link to the service culture?			
	3. Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your	3.1 What is the purpose of an organisational policy?	State the purpose of different organisational policies and procedures that affect their customer service role.		
		3.2 List the organisational policies and procedures that could affect a customer service role?			

	organisation	3.3 What should be included in a complaints process/procedure?			
		3.4 What is meant by digital media?	Describe the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment.		
		3.5 What digital media policies exist in customer service organisations?			
Module	Standard	What do I need to KNOW	Pass Criteria	Distinction Criteria	Method of Assessment
<b>Meeting regulations and legislation</b>	1. Know the appropriate legislation and regulatory requirements that affect your business	1.1 Identify appropriate legislation and regulation and how this effects your organisation	Explain how the relevant legislation and regulations affect the organisation's customer service provision.	Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations.	Apprentice Showcase
	2. Know your responsibility in relation to this and how to apply it when delivering service	2.1 Why is it important to keep information confidential within an organisation	State their responsibilities for keeping information confidential in the organisation.		
		2.2 What information needs to be kept and remain confidential within your organisation?			
		2.3 What are the responsibilities of the employee under the health and safety at work act?	State the responsibilities of employees and employers under the Health and Safety at Work Act.		
		2.4 What are the responsibilities of the employer under the health and safety at work act?			

Module	Standard	What do I need to KNOW	Pass Criteria	Distinction Criteria	Method of Assessment
<b>Systems and resources</b>	1. Know how to use systems, equipment and technology to meet the needs of your customers	1.1 What are the systems, equipment and/or technology your organisation uses to effectively meet customer needs?	Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively.		Apprentice Showcase
		1.2 In your role how would you use the systems, equipment and/or technology to support customer needs?			
	2. Understand types of measurement and evaluation tools available to monitor customer service levels	2.1 What are the types of measurement used to monitor customer service level?	Describe the measures and evaluation tools used in the organisation to monitor customer service levels.		
		2.2 What are the types of evaluation tool used to monitor customer service levels?			
Module	Standard	What do I need to KNOW	Pass Criteria	Distinction Criteria	Method of Assessment
<b>Your role and responsibility</b>	1. Understand your role and responsibility within your organisation and the impact of your actions on others	1.1 What is your job role and responsibilities within that role?	Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation.		Professional Discussion
		1.2 How do your actions impact on others in your organisation?			
	2. Know the targets and goals you need to deliver against	2.2 Identify the targets and goals for your role.	Describe how to achieve their agreed targets and goals.		
		2.3 How do you achieve your targets and goals?			

Module	Standard	What do I need to KNOW	Pass Criteria	Distinction Criteria	Method of Assessment
<b>Customer experience</b>	1. Understand how establishing the facts enable you to create a customer focused experience and appropriate response	1.1 What is meant by a customer focused experience?	Explain how an understanding of the facts can be used to create a customer focused experience.	Explain how to respond to customer needs and requirements positively.	Professional Discussion
		1.2 How do you establish the facts to create a customer focused experience?			
		1.3 How do you use the facts create an appropriate response			
	2. Understand how to build trust with a customer and why this is important	2.1 Why is building customer trust important?	Explain how to build trust with customers and the importance of doing so.		
		2.2 How would you start to build trust with your customers?			
Module	Standard	What do I need to KNOW	Pass Criteria	Distinction Criteria	Method of Assessment
<b>Product and service knowledge</b>	1. Understand the products or services that are available from your organisation and keep up-to-date	1.1 What are your organisations products and/or services?	Explain the difference between the features and benefits of products and/or services in relation to the organisation.	Explain why it is important to update their knowledge on the organisation's products and/or services.	Apprentice Showcase
		1.2 What is the difference between providing a product and providing a service.			

Module	Standard	What I do need to DO	Pass Criteria	Distinction Criteria	Method of Assessment
		1.3 How do you update and maintain your knowledge of your organisations products and/or services?	Describe how to maintain their knowledge of the organisation's products and/or services.		
<b>Interpersonal skills</b>	1. 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.	<p>1.1 Demonstrate effective interpersonal skills that achieve positive customer engagement using:</p> <ul style="list-style-type: none"> <li>∅ Effective use of open and closed questioning skills relevant to the situation</li> <li>∅ Effective use of active listening skills when communicating</li> <li>∅ Effective use of body language when interacting with customers</li> <li>∅ Working with others and sharing good practice when performing your duties</li> </ul> <p>1.2 Recognise customer needs and expectations</p> <p>1.3 Respond to customer needs and manage expectations in a professional and timely manner</p>	<p>Demonstrate willingness and ability to engage with customers in a positive manner using relevant interpersonal skills.</p> <p>Work with customers to build a rapport, recognising and where possible meeting their needs and expectations.</p>	<p>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).</p> <p>Demonstrate ability to balance the needs and expectations of the customer with that of the organisation</p>	Observation

		1.4 Build and maintain a rapport with customers	Show willingness to work with others and share ideas where appropriate.	Pro-actively work with others to ensure efficient customer service delivery.	
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Module	Standard	What I do need to DO	Pass Criteria	Distinction Criteria	Method of Assessment
Communication	1. Depending on your job role and work environment: <ul style="list-style-type: none"> <li>o Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or</li> <li>o Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions.</li> </ul>	1.1 Use appropriate methods of verbal and non-verbal communication skills relevant to your work environment	<b>Face to face'</b> . Demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills.	<b>In all roles</b> , 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.	Observation
		1.2 Use appropriate body language to maintain or enhance the customer experience	Adapt tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations.		
		1.3 Adapt the tone and/or behaviour to maintain or enhance the customer experience as appropriate	Demonstrate ability to recognise when to summarise and the techniques to use.		
		1.4 Confirm yours, and the customers, understanding of the customer's needs and expectations	<b>Non-facing'</b> . Demonstrate ability to make initial customer contact and make use of appropriate communication skills.	<b>In all roles</b> , Demonstrate ability to flex to various customer personalities, while remaining calm and in control where necessary. They will also	

		1.5 Use summarising language and/or reinforcement techniques during customer interaction to confirm understanding.	Adapts tone and behaviour when necessary, recognising and confirming understanding of needs and expectations.	demonstrate they know the organisational procedures to be followed in all communication and the importance to the brand/organisation of this requirement.	
	Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand.	1.6 Use correct, appropriate and clear communication skills e.g. written and verbal that reflect your organisations brand	Demonstrates ability to recognise and use reinforcement techniques during customer interactions		
Module	Standard	What I do need to DO	Pass Criteria	Distinction Criteria	Method of Assessment
<b>Influencing skills</b>	1. Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation	1.1 Identify customer needs	Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation.	Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached.	Apprentice Showcase
		1.2 Offer product and/or service options to customers in a logical and reasoned manner,	Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs.		
		1.3 clearly explain how options offered meets the customers' needs.			
		1.4 Handle customer objections in a positive and professional manner	Handle customer objections in a positive and professional manner.		



Module	Standard	What I do need to DO	Pass Criteria	Distinction Criteria	Method of Assessment
<b>Personal organisation</b>	1. Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines	1.1 Agree goals and deadlines for completing tasks with an appropriate person	Prioritise and plan the completion of tasks according to agreed deadlines.	Respond in a professional manner to challenges and changes and adjust priorities accordingly.	Apprentice Showcase
		1.2 Prioritise and plan the completion of tasks to meet delivery deadlines			
		1.3 Use tools and techniques to monitor progress of tasks	Use appropriate tools and techniques to monitor the progress of tasks completion.		
		1.4 Monitor and adjust priorities as required			
		1.5 Meet agreed deadlines			
<b>Dealing with customer conflict and challenge</b>	2. Demonstrate patience and calmness.	2.1 Show patience, calmness and empathy when dealing with challenging customer situations	Maintain calm and patience at all times when dealing with challenging customer situations.	Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.	
		2.2 Use active listening skills when communicating with customers			
		2.3 Use appropriate questioning skills			
	3. Show you understand the customer's point of view.	3.1 Show understanding of the customer view point	Demonstrate sensitivity to, and interest in, the customers' concerns.		

<b>Dealing with customer conflict and challenge</b>	4. Use appropriate sign-posting or resolution to meet your customers' needs and manage expectations.	4.1 Explain the next steps and/or customer options in a logical manner	Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers.	Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.	Apprentice Showcase
		4.2 Provide clear sign-posting or resolution to meet customers' needs and manage customer expectations	Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures.		
		4.3 Deal with the customer conflict or challenge presented in line with organisational and/or policies procedure			
		4.4 Resolve customer conflict or challenge presented in line with organisational policies and/or procedures			
	5. Maintain informative communication during service recovery.	5.1 Keep customers informed of progress while resolving issues	Keep customers informed of progress while resolving issues.		
		5.2 Maintain accurate record of customer issues and progress to resolution	Maintain accurate record of customer issues and progress to resolution.		

Module	Standard	What I do need to SHOW	Pass Criteria	Distinction Criteria	Method of Assessment
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<b>Developing self</b>	1. Take ownership for keeping your service knowledge and skills up-to-date.	1.1 Identify own strengths and weaknesses in relation to working within a customer service role	Conduct a self-assessment to identify their strengths and weaknesses in relation to the job role.	Review the effectiveness of their personal development plan and update it accordingly.	Apprentice Showcase
		1.2 Apply the techniques of self-assessment to look at strengths and weaknesses			
	2. Consider personal goals and propose development that would help achieve them.	2.1 Prepare a personal development plan that helps to achieve personal goals and development needs.	Produce a personal development plan to support the achievement of their agreed learning and development goals.		
		2.2 Review and update your personal development plan			
<b>Being open to feedback</b>	1. Act on and seek feedback from others to develop or maintain personal service skills and knowledge	1.1 Identify suitable ways of obtaining informal and formal feedback from others	Seek constructive feedback about their customer service skills and knowledge from others.		Apprentice Showcase
		1.2 Obtain useful and constructive feedback about your own service skills and knowledge from others			
		1.3 Positively respond to all feedback	Use feedback from others to develop their customer service skills and knowledge.		
		1.4 Use the feedback received to take responsibility for maintaining and developing your personal customer service skills and knowledge.			

Module	Standard	What I do need to SHOW	Pass Criteria	Distinction Criteria	Method of Assessment
<b>Team working</b>	1 Frequently and consistently communicate and work with others in the interest of helping customers efficiently.	1.1 Demonstrate the interpersonal skills required to work effectively as part of a team	Work with others in a positive and productive manner.	Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers.	Apprentice Showcase
		1.2 Communicate consistently with team members in the interest of helping customers	Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently.		
		1.3 Demonstrate cooperation when working with others			
	2 Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice.	2.1 Share personal learning with others to support good practice	Share personal learning and information with others to support good customer service practice	Present reasoned ideas for improving customer service practice to the appropriate colleagues.	
2.2 Present your ideas and recommendations for improvements in customer service to others					
Module	Standard	What I do need to SHOW	Pass Criteria	Distinction Criteria	Method of Assessment
<b>Equality – treating all customers as</b>	1 Treat customers as individuals to provide a personalised customer service	1.1 Treat all customers equally, ensuring that you comply with legal requirements	Recognise and respond to individual needs to provide a personalised customer service		Observation

individuals	experience.	1.2 Recognise and respond to individual needs to provide a personalised customer service experience	experience.		
	2 Uphold the organisations core values and service culture through your actions.	2.1 Act in a way that upholds the core values and service culture of the organisation	Behave in a way that upholds the core values and service culture of the organisation.		
<b>Module</b>	<b>Standard</b>	<b>What I do need to SHOW</b>	<b>Pass Criteria</b>	<b>Distinction Criteria</b>	<b>Method of Assessment</b>
<b>Presentation – dress code, professional language</b>	1. Demonstrate professional pride in the job through appropriate dress and positive and confident language.	1.1 Present a tidy and professional image	Present a professional image in line with the organisational dress code and code of conduct.		Observation
		1.2 Know and follow organisational dress code			
		1.3 Be approachable and welcoming when dealing with customers face to face			
		<i>Or</i>	<i>Or</i>		
		1.4 Use a welcoming and approachable tone when in non-face to face situations	Demonstrate a positive attitude and welcoming approach consistently when dealing with customers.		
		1.5 Present a positive attitude with all customers and in various situations			
		1.6 Maintain professional and positive language in all situations	Maintain professional and positive language consistently in customer interactions.		
		1.7 Be confident and calm in difficult situations			
<b>Module</b>	<b>Standard</b>	<b>What I do need to SHOW</b>	<b>Pass Criteria</b>	<b>Distinction Criteria</b>	<b>Method of Assessment</b>

<b>“Right first time”</b>	1 Use communication behaviours that establish clearly what each customer requires and manage their expectations.	1.1 Make initial approach to customers in professional manner following organisational procedures	Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging.	Observation
		1.2 Establish customer needs from customer wants	They will show an ability to establish needs and expectations, working towards meeting them where possible, explaining when necessary when they cannot be met	
		1.3 Work towards meeting customer needs		
		1.4 Adapt tone and behaviour to meet customer needs and expectations		
		1.5 Recognise customer expectations	Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures.	
		1.6 Manage customer expectations		
		1.7 Check customer satisfaction		
		1.8 Remain positive and professional when explaining when customer needs and/or expectations cannot be met.		

<b>“Right first time”</b>	2. Take ownership from the first contact and then take responsibility for fulfilling your promise.	2.1 Establish initial contact with customers	Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers.	Observation
		2.2 Recognise customer wants, needs and expectations		
		2.3 Take responsibility and work with customers to achieve outcome	Take ownership from beginning to end, building and maintaining a relationship with the customer.	
		2.4 Maintain contact with customers where necessary and as promised (even if no additional information is available)		
		2.5 Refer customers to others as required accurately passing on necessary information	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.	
		2.6 Follow up as required to ensure outcome is reached		
		2.7 Following organisational procedures, check customer satisfaction.		

**Grading:**

PASS	All Pass Criteria Achieved	100%
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DISTINCTION	All Pass Criteria Achieved, plus...		100%
	Apprentice Showcase	7 of 10 distinction criteria	70%
	Observation	4 of 5 distinction criteria	80%
	Professional Discussion	3 of 4 distinction criteria	75%