

ST0072 Customer Service Practitioner

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Version History

Version	Date	Change(s) made	Section(s)	Publication source(s)
1	September 24	New document.	All	Development Team

This EPA Handbook is for apprentices, employers and providers. It provides an overview of the end-point assessment, the assessment methods, the grading criteria etc. It is a reference document which will guide you through each stage of the process.

For further information about apprenticeship standards and Trailblazers please contact enquiries@openawards.org.uk

Occupational Overview

The role of a customer service practitioner is to deliver high quality products and services to the customers of their organisation. Your core responsibility will be to provide a high-quality service to customers which will be delivered from the workplace, digitally, or through going out into 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, after care, 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.

Further details on the knowledge, skills and behaviours associated within the occupational standard are accessible on the IfATE website¹ and in the Assessment Specification section in this document.

Standard Information

Level: 2

Reference: ST0072

Approved for delivery: 2016

Route: Sales, marketing and procurement

Minimum duration to gateway: 12 months (this does not include the EPA period)

Employers involved in creating the standard: Boots UK, Institute of Customer Service, Accelerator Solutions Ltd, Berkeley Homes Ltd, British Polythene Ltd (t/a bpi.recycled products), British Council, British Gas Services Ltd, BT plc, Carillion plc, E.ON UK Ltd, Northern Powergrid, Osborne Property Services Ltd, Superdrug Stores plc

External Quality Assurance Provider: Ofqual

Entry Requirements

Apprentices will be required to have or achieve level 1 English and Maths prior to completion of their Apprenticeship.

¹ <https://www.instituteforapprenticeships.org/apprenticeship-standards/>

End-point Assessment Documents Overview

An overview of the main documents and supporting materials you will encounter during this end-point assessment is in the table below.

Document Name	Brief Description	Who Should Read this Document	When To Use this Document	Additional Information
Skills Scan	This document is designed to support employers and providers to ensure that an apprentice's job role meets the requirements of the standard.	Employers Providers	Use this during the decision-making process when considering whether the EPA is appropriate for the apprentice.	This allows employers and providers to ensure that the EPA is a good fit for the skills and aspirations of the apprentice.
Apprentice EPA Journey	A one-page visual overview of the different milestones the apprentice will reach within their EPA journey.	Apprentices Employers Providers	Before committing to the course to make sure it is the right fit for you. Throughout the EPA journey.	This roadmap will help you to understand what has been achieved so far and what still needs to be completed.
EPA Handbook	This provides an overview of the end-point assessment, the assessment methods, the grading criteria etc. It is a reference document which will guide you through each stage of the process.	Apprentices Employers Providers	During the apprenticeship as a reminder of the expectations, assessment methods and grading.	This is a key document which will help you to navigate your way through each step of the end-point assessment. Refer back to this frequently.
Progression Tracker	This allows the employer to compile and record an evidence base to prove that the apprentice has demonstrated competence	Apprentices Employers Providers	Throughout the EPA prior to gateway.	This document could be a valuable basis for discussions around progress that the employer may have with the

	against each KSB specified in the assessment plan.			apprentice.
Preparation for the Apprentice Showcase	This gives you a brief reminder of how to prepare for the Apprentice Showcase and the KSBs that will be assessed through this assessment method.	Apprentices Employers Providers	When preparing for your Apprentice Showcase.	The grading descriptors will help apprentices to identify areas you may need to work on.
Preparation for the Practical Observation	This gives you a brief reminder of how to prepare for the Observation of Practice and the KSBs that will be assessed through this assessment method.	Apprentices Employers Providers	When preparing for your Practical Observation.	The grading descriptors will help apprentices to identify areas you may need to work on.
Preparation for the Professional Discussion	This gives you a brief reminder of how to prepare for the Professional Discussion and the knowledge and behaviours that will be assessed	Apprentices Employers Providers	When preparing for your Professional Discussion.	The grading descriptors may help you to complete a self-assessment whilst preparing for the Professional Discussion
Gateway Authenticity and Declaration form	This form declares that the apprentice is ready for gateway, the gateway conditions have been met and the evidence submitted has been produced by the apprentice.	Apprentices Employers Providers	At gateway.	This form needs to be signed by employers, providers and the apprentice. The apprentice is unable to enter gateway until this form has been completed and submitted.

Gateway Requirements

The training provider must provide Open Awards with the following evidence to enable us to approve the gateway.

- Apprentices must have completed the minimum apprenticeship on-programme duration (12 months from the start date).
- Level 1 English and mathematics. For those apprentices with an education health and care plan or a legacy statement, the apprenticeship's English and mathematics minimum requirement is Entry Level 3 and British Sign Language qualifications are an alternative to English qualifications for whom this is their primary language.
- Fully completed and signed Gateway Authenticity Declaration form.

For more information on acceptable qualifications for English and mathematics, please visit [here](#).

Assessment

The ST0072 EPA consists of three (3) assessment methods:

- Apprentice Showcase
- Practical Observation
- Professional Discussion

Assessment Preparation

Support materials are available on the Open Awards portal to help prepare apprentices for their assessments. These materials will also support training providers and employers post-gateway to ensure apprentices are well prepared for their EPA experience. They are not intended to be used to measure proficiency pre-gateway or to support gateway decisions. Training providers can access these materials through the Secure Portal.

Order of Assessments

There is flexibility to the order of assessment methods. However, it is recommended that the practical observation is completed prior to the professional discussion because some criteria e.g., the “right first time” module, can be covered in the professional discussion if not covered within the practical observation.

Assessment Window

All assessments must be passed within a period of three (3) months from Open Awards approving the gateway.

Apprentice Showcase

The apprentice showcase is compiled after twelve (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’. The apprentice showcase will be reviewed and assessed by the independent assessor.

There are two (2) components to this assessment method. A showcase and an interview.

The apprentice will present their showcase to the independent assessor to provide the opportunity for them to interview the apprentice to cover areas not covered in the presentation.

Delivery

The apprentice showcase must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this EPA method to the highest available grade. The independent assessor must only conduct one (1) apprentice showcase at a time to ensure quality and rigour and they must be as unobtrusive as possible.

The showcase can be delivered in two (2) forms. Either a:

- Written report, or
- Presentation

Both delivery methods are followed by an interview.

Written Report

Apprentices can submit their showcase as a written report with a minimum of 2,000 words and a maximum of 3,000 words. The written report must be completed after gateway and a submission date will be agreed between the apprentice and independent assessor. The apprentice is encouraged to bring their showcase into the interview to support them. They may also bring additional notes if they wish.

The report must be submitted to Open Awards within six (6) weeks of the gateway date. This allows the independent assessor time to review the report prior to conducting the interview.

Open Awards will provide a report template brief to support apprentices.

Presentation

Apprentices can deliver their showcase using a visual presentation. This should be completed within six (6) weeks of the gateway date.

The apprentice may use Microsoft PowerPoint, Apple Keynote, Prezi, Google Slides or other software to produce their presentation. The apprentice can deliver their presentation live to the independent assessor or they may accompany their presentation with an audio and/or a video recording of their delivery of the presentation. Whichever option is chosen, the presentation must last a maximum of 30 minutes. There is no minimum number of slides or length of presentation. If the apprentice delivers the presentation live to the independent assessor, they will also complete the interview directly following the presentation.

The presentation must not contain more than 30 slides.

Any slides or audio exceeding the maximum limit will not be assessed and will not contribute to the final grade. The report brief template may also be used to structure the presentation.

The presentation of the apprentice showcase can be delivered face to face or remotely using suitable IT software, such as Teams.

Interview

The written report or presentation will be followed by an interview.

Where an apprentice chooses to deliver the showcase via a presentation, the interview will take place immediate afterwards.

Where an apprentice chooses to submit a written report, it is recommended that the interview is scheduled for no more than five (5) days after the submission date.

The interview will expand on the written report or presentation, allowing the independent assessor to confirm the apprentice's knowledge, skills and behaviours. The questions will directly link to the evidence supplied within the showcase. The apprentice should take notes and/or their showcase into the interview to support them.

The independent assessor will explain to the apprentice the format and timescales of the apprentice showcase before it begins. This does not count towards the assessment time.

Assessment Timings

Where an apprentice chooses to deliver the showcase via a presentation, this will last for a maximum of 30 minutes.

The apprentice showcase interview will last for a maximum of 30 minutes.

This time is to allow the apprentice to respond to the questions and add clarity to their showcase.

Pass and Distinction grading descriptors for the apprentice showcase are in the following table.

Apprentice Showcase - Grading Descriptors

Pass Grading Descriptors	
P1	State the aims of the organisation in relation to its sector
P2	State what is meant by the organisation's 'brand promise'
P3	Explain how the organisation's core values relate to its service culture
P4	State the purpose of different organisational policies and procedures that affect their customer service role
P5	Describe the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment
P6	Explain how the relevant legislation and regulations affect the organisation's customer service provision
P7	State their responsibilities for keeping information confidential in the organisation
P8	State the responsibilities of employees and employers under the Health and Safety at Work Act
P9	Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively
P10	Describe the measures and evaluation tools used in the organisation to monitor customer service levels
P11	Explain the difference between the features and benefits of products and/or services in relation to the organisation

Pass Grading Descriptors	
P12	Describe how to maintain their knowledge of the organisation's products and/or services
P13	Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation
P14	Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs
P15	Handle customer objections in a positive and professional manner
P16	Prioritise and plan the completion of tasks according to agreed deadlines
P17	Use appropriate tools and techniques to monitor the progress of tasks completion
P18	Maintain calm and patience at all times when dealing with challenging customer situations
P19	Demonstrate sensitivity to, and interest in, the customers' concerns
P20	Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers
P21	Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures
P22	Keep customers informed of progress while resolving issues
P23	Maintain accurate record of customer issues and progress to resolution
P24	Conduct a self-assessment to identify their strengths and weaknesses in relation to the job role
P25	Produce a personal development plan to support the achievement of their agreed learning and development goals
P26	Seek constructive feedback about their customer service skills and knowledge from others
P27	Use feedback from others to develop their customer service skills and knowledge
P28	Work with others in a positive and productive manner
P29	Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently
P30	Share personal learning and information with others to support good customer service practice
Distinction Grading Descriptors	
D1	Explain how the organisational policies and procedures impact on the delivery of customer service
D2	Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations
D3	Explain how a code of practice or ethical standards affects customer service
D4	Explain why it is important to update their knowledge on the organisation's products and/or services
D5	Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached
D6	Respond in a professional manner to challenges and changes and adjust priorities accordingly
D7	Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met
D8	Review the effectiveness of their personal development plan and update it accordingly
D9	Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers
D10	Present reasoned ideas for improving customer service practice to the appropriate colleagues

To achieve a pass, the apprentice must meet **all** of the pass grading descriptors.

To achieve a distinction, the apprentice must meet **all** of the pass **and** 7 of the 10 distinction grading descriptors.

A fail grade would be given where the candidate does **not** meet all of the pass grading descriptors.

Apprentice Showcase - Knowledge, Skills and Behaviours

Ref	Criteria
Knowledge	
K4	Know the purpose of the business and what 'brand promise' means
K5	Know your organisation's core values and how they link to the service culture
K6	Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation
K7	Know the appropriate legislation and regulatory requirements that affect your business
K8	Know your responsibility in relation to this and how to apply it when delivering service
K9	Know how to use systems, equipment and technology to meet the needs of your customers
K10	Understand types of measurement and evaluation tools available to monitor customer service levels
K16	Understand the products or services that are available from your organisation and keep up-to-date
Skills	
S4	Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation
S5	Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines
S6	Demonstrate patience and calmness
S7	Show you understand the customer's point of view
S8	Use appropriate signposting or resolution to meet your customers' needs and manage expectations
S9	Maintain informative communication during service recovery
Behaviours	
B1	Take ownership for keeping your service knowledge and skills up-to-date
B2	Consider personal goals and propose development that would help achieve them
B3	Act on and seek feedback from others to develop or maintain personal service skills and knowledge
B4	Frequently and consistently communicate and work with others in the interest of helping customers efficiently
B5	Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice

Practical Observation

In the practical observation, the independent assessor observes the apprentice in their workplace. The apprentice completes their day-to-day duties under normal working conditions. This allows the apprentice to demonstrate the KSBs through naturally occurring evidence.

The independent assessor may ask questions during the practical observation if they need to clarify a point on what is being observed. Any questions will be asked in a non-obtrusive manner. Simulation is not permitted during the observation. The observation and responses to questions must be assessed holistically by the independent assessor.

It is mandatory that the observation covers the following modules as a minimum: presentation, equality, interpersonal skills, communication and personal organisation. The “Right first time” module can be covered by either the practical observation or the professional discussion.

Any criteria not covered by the practical observation can be assessed within the professional discussion. However, any criteria that are deemed as failed within the practical observation cannot be covered within the professional discussion.

Delivery

The practical observation must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this EPA method to the highest available grade. The independent assessor must only observe one (1) apprentice to ensure quality and rigour and they must be as unobtrusive as possible.

The observation may be continuous or split into sections to allow the apprentice to move from one area to another if required. Travel between one area and another will not count towards the assessment time. However, it is not expected that the apprentice will move between sites at different locations and the assessment time will restart once the apprentice is at the next work station.

Independent assessors will manage invigilation of apprentices at all times, including moving between locations.

The independent assessor will explain to the apprentice the format and timescales of the observation before it begins. This does not count towards the assessment time.

Assessment Timings

The practical observation will last a minimum of one (1) hour and a maximum of two (2) hours.

Pass and Distinction grading descriptors for the practical observation are in the following table.

Practical Observation - Grading Descriptors

Pass Grading Descriptors		
P1	Demonstrate willingness and ability to engage with customers in a positive manner using relevant interpersonal skills	
P2	Work with customers to build a rapport, recognising and where possible meeting their needs and expectations	
P3	Show willingness to work with others and share ideas where appropriate	
P4	Demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills	Face to face only
P5	Adapt tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations	
P6	Demonstrate ability to recognise when to summarise and the techniques to use	
P7	Demonstrate ability to make initial customer contact and make use of appropriate communication skills	Non face to face only
P8	Adapts tone and behaviour when necessary, recognising and confirming understanding of needs and expectations	
P9	Demonstrates ability to recognise and use reinforcement techniques during customer interactions	
P10	Recognise and respond to individual needs to provide a personalised customer service experience	
P11	Behave in a way that upholds the core values and service culture of the organisation	
P12	Present a professional image in line with the organisational dress code and code of conduct	Face to face only
P13	Demonstrate a positive attitude and welcoming approach consistently when dealing with customers	Non face to face only
P14	Maintain professional and positive language consistently in customer interactions	
P15	Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging	
P16	They will show an ability to establish needs and expectations, working towards meeting them where possible, explaining when necessary when they cannot be met	
P17	Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures	
P18	Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers	
P19	Take ownership from beginning to end, building and maintaining a relationship with the customer	
P20	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	

Distinction Grading Descriptors	
D1	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)
D2	Demonstrate ability to balance the needs and expectations of the customer with that of the organisation

Distinction Grading Descriptors	
D3	Pro-actively work with others to ensure efficient customer service delivery
D4	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
D5	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

To achieve a pass, the apprentice must meet **all** of the pass grading descriptors.

To achieve a distinction, the apprentice must meet **all** of the pass **and** 4 of the 5 distinction grading descriptors.

A fail grade would be given where the candidate does **not** meet all of the pass grading descriptors.

Practical Observation - Knowledge, Skills and Behaviours

Ref	Criteria
Skills	
S1	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
S2	Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions
S3	Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand
Behaviours	
B6	Treat customers as individuals to provide a personalised customer service experience
B7	Uphold the organisations core values and service culture through your actions
B8	Demonstrate professional pride in the job through appropriate dress and positive and confident language
B9	Use communication behaviours that establish clearly what each customer requires and manage their expectations
B10	Take ownership from the first contact and then take responsibility for fulfilling your promise

Professional Discussion

The apprentice and the IEPA will have a formal two-way conversation, allowing the apprentice to evidence the grading descriptors assigned to this assessment method. A portfolio of evidence may be used by the apprentice to provide evidence to support the discussion but will not in itself be assessed or contribute to the overall grade.

The professional discussion must be conducted on a 1:1 basis in a controlled environment free from distraction or influence. The discussion can take place face-to-face or remotely via video conferencing. The discussion will be recorded.

Assessment Timing

The professional discussion will last for one (1) hour (+/-10%)

Pass and grading criteria for the Professional Discussion are in the following table.

Professional Discussion Grading Descriptors

Pass Grading Descriptors	
P1	Explain the difference between internal and external customers in the context of their organisation
P2	Describe the specific needs of different customers, including those protected under current Equality law
P3	Explain when and how to adapt their service approach to meet the needs and expectations of customers
P4	Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation
P5	Describe how to achieve their agreed targets and goals
P6	Explain how an understanding of the facts can be used to create a customer focused experience
P7	Explain how to build trust with customers and the importance of doing so
Distinction Grading Descriptors	
D1	Explain the importance of building good customer relationships to the organisation
D2	Explain the difference in the way internal and external customer relationships are managed
D3	Explain the importance of balancing the needs of both the organisation and its customers
D4	Explain how to respond to customer needs and requirements positively

To achieve an overall pass, the apprentice must achieve **all** of the pass grading descriptors.

To achieve a distinction, the apprentice must meet **all** of the pass **and** 3 of the 4 distinction grading descriptors.

A fail grade would be given where the candidate does **not** meet all of the pass grading descriptors.

Professional Discussion Knowledge, Skills and Behaviours

Ref	Criteria
Knowledge	
K1	Understand who customers are
K2	Understand the difference between internal and external customers
K3	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
K11	Understand your role and responsibility within your organisation and the impact of your actions on others
K12	Know the targets and goals you need to deliver against
K13	Understand how establishing the facts enable you to create a customer focused experience and appropriate response
K14	Understand how to build trust with a customer and why this is important

Ref	Criteria
K16	Understand how to build trust with a customer and why this is important

Grading

Apprentice Showcase

- If one or more pass grading descriptors are not met, the assessment will be graded as a fail.
- To achieve a pass **all** pass criteria must be met.
- To achieve a distinction **all** pass criteria **and** 7 of the 10 distinction criteria must be met.

Practical Observation

- If one or more pass grading descriptors are not met, the assessment will be graded as a fail.
- To achieve a pass **all** pass criteria must be met.
- To achieve a distinction **all** pass criteria **and** 4 of the 5 distinction criteria must be met.

Professional Discussion

- If one or more pass grading descriptors are not met, the assessment will be graded as a fail.
- To achieve a pass **all** pass criteria must be met.
- To achieve a distinction **all** pass criteria **and** 3 of the 4 distinction criteria must be met.

Overall grade

The grades from individual assessment methods will be combined in the following way to determine the overall grade:

Apprentice Showcase	Practical Observation	Professional discussion	Overall grade
Fail	Any grade	Any grade	Fail
Any grade	Fail	Any grade	Fail
Any grade	Any grade	Fail	Fail
Pass	Pass	Pass	Pass
Pass	Pass	Distinction	Pass
Pass	Distinction	Pass	Pass
Distinction	Pass	Pass	Pass
Pass	Distinction	Distinction	Pass
Distinction	Pass	Distinction	Pass
Distinction	Distinction	Pass	Pass
Distinction	Distinction	Distinction	Distinction

Resits and Retakes

Apprentices who fail one or more assessment method will be offered the opportunity to take a resit or a retake. Open Awards will provide feedback alongside the result notification to all apprentices who fail an assessment method. This feedback will be provided via the training provider, normally **within ten (10) working days** of the assessment taking place.

Resits or retakes are only to be taken in the event that the original assessment grade is a fail. A resit or retake cannot be taken with the intention of increasing the original grade if an apprentice has passed their EPA. Therefore, feedback will not normally be provided to apprentices who achieve a pass or higher.

The maximum grade that can be achieved for a resit or retake is a pass. Where an apprentice believes exceptional circumstances impacted on their initial assessment attempt, they must submit a formal request with supporting evidence for exceptional circumstances to be considered, directly to Open Awards **within five (5) working days** of receiving the assessment decision.

Resits and retakes must be completed within three (3) months of the gateway date otherwise the entire EPA will need to be taken again.

Please note:

Apprentice Showcase

The Showcase presentation or written report should be re-submitted for the resit (or retake) to Open Awards within five (5) working days of receiving the assessment decision five (5) working days of receiving the assessment decision, unless an alternative deadline is agreed with Open Awards.. Booking the resit (or retake) can then be made in line with the minimum working days' notice required by Open Awards. This component resit (or retake) should be completed remotely.

Practical Observation

This component resit (or retake) will be completed face-to-face in the apprentice's workplace.

Professional discussion

This component resit (or retake) can be completed remotely. However, if the practical observation is being completed again (as well as the professional discussion) then it is likely that both components will be completed face-to-face in the apprentice's workplace.

Quality assurance

Independent End-point Assessor Standard Requirements

Independent End Point Assessors 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

Internal Quality Assurance

Open Awards will complete quality assurance on assessments before results are released. Quality assurance is completed through observations and examination of documentation on a risk-based sampling model.

External Quality Assurance

External quality assurance for this apprenticeship standard is undertaken by Ofqual.

Assessment Specification

The assessment specification can be found on our website and on IfATE's website in the published assessment plan for the standard. Details of which elements of the apprenticeship standard will be tested by each assessment method are given below.

Mapping of Knowledge, Skills, and Behaviours

Key:	
Apprentice Showcase	AS
Practical Observation	PO
Professional Discussion	PD

Ref	KSB to be assessed	Assessment Method
Knowledge		
Knowing your customers		
K1	Understand who customers are	PD
The apprentice will need to know: <ul style="list-style-type: none"> Who their customers are Who the organisations customers are The different types of customers 		
K2	Understand the difference between internal and external customers	PD
The apprentice will need to know: <ul style="list-style-type: none"> What is an internal customer What is an external customer Who the organisations internal customers are Who the organisations external customers are The difference between internal and external customers to the organisation 		
K3	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	PD
The apprentice will need to know: <ul style="list-style-type: none"> The purpose of customer service The different needs of your customers The different priorities of your customers The specific needs that customers may have, including those that are protected under current equality law What is meant by customer expectations How the standard of customer service affects the success of your organisation When to adapt your service approach to meet the needs and expectations of your customers How to adapt your service approach to meet the needs and expectations of your customers 		
Understanding the organisation		
K4	Know the purpose of the business and what 'brand promise' means	AS

Ref	KSB to be assessed	Assessment Method
The apprentice will need to know: <ul style="list-style-type: none"> • The difference between public, private and third sector organisations • Their organisations business type and purpose • What 'brand promise' means 		
K5	Know your organisation's core values and how they link to the service culture	AS
The apprentice will need to know: <ul style="list-style-type: none"> • What is meant by an organisations core values • What are your organisations core values • What is meant by service culture • What is your organisations service culture • How your organisations core values link to the service culture 		
K6	Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation	AS
The apprentice will need to know: <ul style="list-style-type: none"> • The purpose of an organisational policy • The organisational policies and procedures that could affect a customer service role • What is included in a complaints process/procedure • What is meant by digital media • What digital media policies exist in customer service organisations 		
Meeting regulations and legislation		
K7	Know the appropriate legislation and regulatory requirements that affect your business	AS
The apprentice will need to know: <ul style="list-style-type: none"> • Appropriate legislation and regulation and how this effects your organisation This could include: Consumer Rights Act 2015, Data Protection Act 2018, Equality Act 2010, Consumer Contracts Regulations.		
K8	Know your responsibility in relation to this and how to apply it when delivering service	AS
The apprentice will need to know: <ul style="list-style-type: none"> • The importance of keeping information confidential within an organisation • What information needs to be kept and remain confidential within your organisation • The responsibilities of the employee under the health and safety at work act • The responsibilities of the employer under the health and safety at work act 		
Systems and resources		
K9	Know how to use systems, equipment and technology to meet the needs of your customers	AS
The apprentice will need to know: <ul style="list-style-type: none"> • The systems, equipment and/or technology your organisation uses to effectively meet customer needs • How to use the systems, equipment and/or technology to support customer needs in their role 		
K10	Understand types of measurement and evaluation tools available to monitor customer service levels	AS
The apprentice will need to know: <ul style="list-style-type: none"> • The types of measurements used to monitor customer service level • The types of evaluation tools used to monitor customer service levels 		
Your role and responsibility		

Ref	KSB to be assessed	Assessment Method
K11	Understand your role and responsibility within your organisation and the impact of your actions on others	PD
The apprentice will need to know: <ul style="list-style-type: none"> • Their job role and responsibilities within that role • How their actions impact on others in your organisation 		
K12	Know the targets and goals you need to deliver against	PD
The apprentice will need to know: <ul style="list-style-type: none"> • The targets and goals for your role • How to achieve your targets and goals 		
Customer experience		
K13	Understand how establishing the facts enable you to create a customer focused experience and appropriate response	PD
The apprentice will need to know: <ul style="list-style-type: none"> • What is meant by a customer focused experience • How to establish the facts to create a customer focused experience • How to use the facts to create an appropriate response 		
K14	Understand how to build trust with a customer and why this is important	PD
The apprentice will need to know: <ul style="list-style-type: none"> • The importance of building customer trust • How to build trust with your customers 		
Product and service knowledge		
K15	Understand the products or services that are available from your organisation and keep up-to-date	AS
The apprentice will need to know: <ul style="list-style-type: none"> • Their organisations products and/or services • The difference between providing a product and providing a service • How to update and maintain knowledge of your organisations products and/or services 		

Skills		
Interpersonal skills		
S1	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	PO
The apprentice will need to: <ul style="list-style-type: none"> • Demonstrate effective interpersonal skills that achieve positive customer engagement using: <ul style="list-style-type: none"> ○ Effective use of open and closed questioning skills relevant to the situation ○ Effective use of active listening skills when communicating ○ Effective use of body language when interacting with customers ○ Working with others and sharing good practice when performing your duties • Recognise customer needs and expectations • Respond to customer needs and manage expectations in a professional and timely manner • Build and maintain a rapport with customers 		
Communication		

S2	Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions	PO
The apprentice will need to: <ul style="list-style-type: none"> • Use appropriate methods of verbal and non-verbal communication skills relevant to your work environment • Use appropriate body language to maintain or enhance the customer experience • Adapt the tone and/or behaviour to maintain or enhance the customer experience as appropriate • Confirm yours, and the customers, understanding of the customer's needs and expectations • Use summarising language and/or reinforcement techniques during customer interaction to confirm understanding 		
S3	Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand	PO
The apprentice will need to: <ul style="list-style-type: none"> • Use correct, appropriate and clear communication skills e.g. written and verbal that reflect your organisations brand 		
Influencing skills		
S4	Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation	AS
The apprentice will need to: <ul style="list-style-type: none"> • Identify customer needs • Offer product and/or service options to customers in a logical and reasoned manner • Clearly explain how options offered meets the customers' needs • Handle customer objections in a positive and professional manner 		
Personal organisation		
S5	Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines	AS
The apprentice will need to: <ul style="list-style-type: none"> • Agree goals and deadlines for completing tasks with an appropriate person • Prioritise and plan the completion of tasks to meet delivery deadlines • Use tools and techniques to monitor progress of tasks • Monitor and adjust priorities as required • Meet agreed deadlines 		
Dealing with customer conflict and challenge		
S6	Demonstrate patience and calmness	AS
The apprentice will need to: <ul style="list-style-type: none"> • Show patience, calmness and empathy when dealing with challenging customer situations • Use active listening skills when communicating with customers • Use appropriate questioning skills 		
S7	Show you understand the customer's point of view	AS
The apprentice will need to: <ul style="list-style-type: none"> • Show understanding of the customer view point 		
S8	Use appropriate signposting or resolution to meet your customers' needs and manage expectations	AS

The apprentice will need to: <ul style="list-style-type: none"> • Explain the next steps and/or customer options in a logical manner • Provide clear sign-posting or resolution to meet customers' needs and manage customer expectations • Deal with the customer conflict or challenge presented in line with organisational and/or policies procedure • Resolve customer conflict or challenge presented in line with organisational policies and/or procedures 		
S9	Maintain informative communication during service recovery	AS
The apprentice will need to: <ul style="list-style-type: none"> • Keep customers informed of progress while resolving issues • Maintain accurate record of customer issues and progress to resolution 		

Behaviours		
Developing self		
B1	Take ownership for keeping your service knowledge and skills up-to-date	AS
The apprentice will need to: <ul style="list-style-type: none"> • Identify own strengths and weaknesses in relation to working within a customer service role • Apply the techniques of self-assessment to look at strengths and weaknesses 		
B2	Consider personal goals and propose development that would help achieve them	AS
The apprentice will need to: <ul style="list-style-type: none"> • Prepare a personal development plan that helps to achieve personal goals and development needs • Review and update your personal development plan 		
Being open to feedback		
B3	Act on and seek feedback from others to develop or maintain personal service skills and knowledge	AS
The apprentice will need to: <ul style="list-style-type: none"> • Identify suitable ways of obtaining informal and formal feedback from others • Obtain useful and constructive feedback about your own service skills and knowledge from others • Positively respond to all feedback • Use the feedback received to take responsibility for maintaining and developing your personal customer service skills and knowledge 		
Team working		
B4	Frequently and consistently communicate and work with others in the interest of helping customers efficiently	AS

The apprentice will need to: <ul style="list-style-type: none"> • Demonstrate the interpersonal skills required to work effectively as part of a team • Communicate consistently with team members in the interest of helping customers • Demonstrate cooperation when working with others 		
B5	Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice	AS
The apprentice will need to: <ul style="list-style-type: none"> • Share personal learning with others to support good practice • Present your ideas and recommendations for improvements in customer service to others 		
Equality – treating all customers as individuals		
B6	Treat customers as individuals to provide a personalised customer service experience	PO
The apprentice will need to: <ul style="list-style-type: none"> • Treat all customers equally, ensuring that you comply with legal requirements • Recognise and respond to individual needs to provide a personalised customer service experience 		
B7	Uphold the organisations core values and service culture through your actions	PO
The apprentice will need to: <ul style="list-style-type: none"> • Act in a way that upholds the core values and service culture of the organisation 		
Presentation – dress code, professional language		
B8	Demonstrate professional pride in the job through appropriate dress and positive and confident language	PO
The apprentice will need to: <ul style="list-style-type: none"> • For face to face: <ul style="list-style-type: none"> ○ Present a tidy and professional image ○ Know and follow organisational dress code ○ Be approachable and welcoming when dealing with customers face to face • For non-face to face <ul style="list-style-type: none"> ○ Use a welcoming and approachable tone when in non-face to face situations ○ Present a positive attitude with all customers and in various situations ○ Maintain professional and positive language in all situations ○ Be confident and calm in difficult situations 		
Right first time		
B9	Use communication behaviours that establish clearly what each customer requires and manage their expectations	PO
The apprentice will need to: <ul style="list-style-type: none"> • Make initial approach to customers in professional manner following organisational procedures • Establish customer needs from customer wants • Work towards meeting customer needs • Adapt tone and behaviour to meet customer needs and expectations • Recognise customer expectations • Manage customer expectations • Check customer satisfaction • Remain positive and professional when explaining when customer needs and/or expectations cannot be met 		
B10	Take ownership from the first contact and then take responsibility for fulfilling your promise	PO

The apprentice will need to:

- Establish initial contact with customers
- Recognise customer wants, needs and expectations
- Take responsibility and work with customers to achieve outcome
- Maintain contact with customers where necessary and as promised (even if no additional information is available)
- Refer customers to others as required accurately passing on necessary information
- Follow up as required to ensure outcome is reached
- Follow organisational procedures, check customer satisfaction

Open Awards Policies

Current versions of the following Open Awards policies are accessible through the Secure Portal.

These policies include:

- End Point Assessment Pricing Policy
- Reasonable Adjustments and Special Considerations Policy
- Data Protection
- Enquiries and Appeals Policy
- Complaints Policy
- Malpractice and Maladministration Policy
- Equality and Diversity Policy
- Sanctions Policy
- Safeguarding Policy
- Conflict of Interest Policy
- Fair Access Policy

In addition, the current version of the following relevant document may be obtained by training providers, employers or apprentices by contacting Open Awards directly:

- Instructions for Conducting Controlled Assessment Remotely

Support

For information about Open Awards support offer, including information on our policies, quality assurance, re-sits, appeals, complaints and general enquiries, please see our website: www.openawards.org.uk or contact our customer service team on 0151 494 2072 or via email at enquiries@openawards.org.uk.

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