



VTCT Skills

/// END-POINT ASSESSMENT



END-POINT ASSESSMENT GUIDE

**VTCT Skills Level 3 End-point Assessment
for ST0071 Customer Service Specialist v1.1**



Please note, the contents of this booklet are subject to change at any time due to regulatory requirements. Therefore, it is imperative for the user of this document to verify they are in fact using the most up to date version.

This can be done by checking it matches the version published on epaPRO, VTCT Skills online End-point Assessment booking platform.

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VTCT Skills Level 2 End-point Assessment for ST0071 Customer Services Specialist v1.1

Purpose

This End-point Assessment guidebook outlines the format and the requirements of the End-point Assessment for the Level 3 VTCT Skills Customer Service Specialist v1.1 standard.

Prior to the End-point Assessment period, a full-time apprentice will typically spend 15 months on programme (before the gateway) to complete the criteria included within the occupational standard.

All apprentices must spend a minimum of 12 months on-programme. Once the on-programme requirements have been met, the Apprentice can proceed through the gateway stage to the End-point Assessment period.

The End-point Assessment will consist of three different assessment methods; practical observation with questions and answers, work-based project supported by an interview and professional discussion supported by a portfolio of evidence. Although there is flexibility in the order in which each assessment method is carried out, it is recommended that the written work-based project takes place before the professional discussion.

Apprenticeship Standard Summary

On-programme Stage (typically 15 months):

- The Apprentice must receive training to develop the Knowledge, Skills and Behaviours (KSBs) of the occupational standard
- The Apprentice must receive training towards English and maths qualifications in line with the apprenticeship funding rules
- The Apprentice must produce a portfolio of evidence

End-point Assessment Gateway Stage:

The employer must confirm that the Apprentice;

- is working at or above the occupational standard as a Customer Service Specialist
- has the evidence required to pass the gateway and is ready to take the End-point Assessment

The Apprentice must achieve English and maths qualifications in line with the apprenticeship funding rules.

Apprentices must submit the following;

- a portfolio of evidence to underpin the professional discussion

End-point Assessment Stage (typically three months):

Assessment Method 1:

Practical observation with questions and answers

- Fail
- Pass
- Distinction

Assessment Method 2:

Work-based project, supported by an interview

- Fail
- Pass
- Distinction

Assessment Method 3:

Professional discussion supported by portfolio evidence

- Fail
- Pass
- Distinction

Overall End-point Assessment and Apprenticeship can be Graded:

- Fail
- Pass
- Distinction

Re-sits and re-takes:

- Re-take and re-sit grade cap: Pass
- Re-sit timeframe: 12 months
- Re-take timeframe: 12 months

Customer Service Specialist Apprenticeship Standard

Occupational Profile

The main purpose of a Customer Service Specialist is to be a 'professional' for direct customer support within all sectors and organisation types. They are an advocate of customer service who acts as a referral point for dealing with more complex or technical customer requests, complaints and queries. They are often an escalation point for complicated or ongoing customer problems. As an expert in the organisation's products and/or services, they share knowledge with the wider team and colleagues. They gather and analyse data and customer information that influences change and improvements in service. Utilising both organisational and generic IT systems to carry out the role with an awareness of other digital technologies. This could be in many types of environments including contact centres, retail, webchat, service industry or any customer service point.

The Gateway Stage

To be eligible for the End-point Assessment Stage of the End-point Assessment, the Apprentice must meet the following gateway requirements:

- A full time apprentice will typically spend 15 months on-programme. All apprentices must spend a minimum of 12 months on-programme
- Complete the on-programme stage of the Level 3 Customer Service Specialist Apprenticeship Standard and consistently work at or above the level set out in the occupational standard
- Submit a portfolio of evidence which will underpin the professional discussion
- Achieve English and maths qualifications in line with the Apprenticeship funding rules

The Apprentice's employer must formally sign off that they are satisfied that the Apprentice is consistently working at or above the level set out in the Customer Service Specialist occupational standard, and that the Apprentice is deemed to have achieved occupational competence, before the gateway process can be implemented. The Apprentice must also confirm that they feel ready to move on to their End-point Assessment.

When making this decision, the employer may take advice from the Apprentice's training provider(s); however, the decision must ultimately be made solely by the Apprentice's employer. It is important to refer back to the assessment plan when approaching gateway in order to check that the Apprentice is able to demonstrate all of the required Knowledge, Skills and Behaviours and they can do so in a live End-point Assessment.

A copy of the standard can be located through the following link: <https://www.instituteforApprenticeships.org/Apprenticeship-standards>

Only apprentices who complete the gateway successfully can start the End-point Assessment.

Gateway evidence must be submitted to VTCT Skills, along with any organisation specific policies and procedures requested by VTCT Skills.

Assessment Method 1: Practical observation with questions and answers

There are no specific requirements at the gateway stage to upload evidence for the practical observation with questions and answers assessment method.

Assessment Method 2: Work-based project, supported by an interview

There are no specific requirements at the gateway stage to upload evidence for this assessment method. The work-based project is required to be uploaded post gateway.

Assessment Method 3: Professional discussion supported by portfolio evidence

For the professional discussion supported by a portfolio of evidence, the Apprentice will submit a portfolio of evidence. Which should be compiled during the on-programme period of the apprenticeship. Evidence must be mapped against the KSBs criteria set out in the professional discussion supported by a portfolio of evidence assessment method. Portfolio of evidence requirements for gateway stage:

- The portfolio of 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
- One piece of evidence can be mapped against more than one Knowledge, Skill or Behavioural requirement
- The portfolio of evidence can be in any format, as long as it is legible and can be uploaded electronically to epaPRO
- The portfolio of evidence must be submitted to VTCT Skills at the gateway stage
- A completed 'Portfolio of Evidence Mapping Document' is required to be uploaded alongside the portfolio of evidence
- A 'Declaration of Authenticity' is required to be uploaded alongside the portfolio of evidence

***Evidence sources may include:**

- Workplace documentation and records, for example:
 - Workplace policies and procedures
 - Witness statements
 - Annotated photographs
 - Video clips with a maximum total duration 10 minutes; the Apprentice must be in view and identifiable

*This is not a definitive list; other evidence sources can be included.

The portfolio of evidence should not include reflective accounts or any methods of self-assessment. Any employer contributions should focus on direct observation of performance, for example, witness statements, rather than opinions. The evidence provided should be valid and attributable to the Apprentice; the portfolio of evidence should contain a statement from the employer and apprentice confirming this.

VTCT Skills will not assess the portfolio of evidence directly as it supports the professional discussion. The Independent Assessor will review the portfolio of evidence to prepare questions for the discussion. They are not required to provide feedback after their review.

Notes

Use this area for notes and diagrams.

Scheduling

Registering an Apprentice for End-point Assessment

Providers/employers can register the Apprentice(s) for End-point Assessment via epaPRO. Apprentices can be registered at any time during their Apprenticeship at no additional upfront cost. Providers/employers will require the Apprentice's:

- Unique Learner Number (ULN)
- Name
- Date of birth

Further information on registering the Apprentices will be supplied once VTCT Skills has received the signed End-point Assessment Organisation (EPAO) agreement.

Scheduling an Apprentice for End-point Assessment

Providers must confirm that the Apprentice has completed all of the mandated components of the standard via the 'Apprentice checklist' on the booking platform:

- End-point Assessment bookings must be made a minimum of 20 working days in advance of the desired assessment date(s) or within the standard requirement
- Providers/employers will need to indicate preferred dates of assessment on epaPRO
- The End-point Assessment team will seek to match an Independent Assessor to the request
- The End-point Assessment team will formally confirm the booking by email and via epaPRO

Reasonable Adjustments

It is the responsibility of the provider/employers to apply for reasonable adjustments/access arrangements on behalf of the Apprentice prior to the End-point Assessment taking place. For more information on reasonable adjustments, please refer to the 'VTCT Skills Reasonable Adjustments and Special Considerations Policy'. This policy can be accessed on the epaPRO system.

Remote End-point Assessments

Remote End-point Assessments can be conducted via a video conferencing platform. The Apprentice will receive an automated email containing a link to their video conferencing platform within 72 hours of the assessment being booked. The Apprentice will need this link to enter the video conferencing platform and complete their assessment.

Face-to-face End-point Assessments

Face-to-face assessments will take place within the Apprentice's normal workplace setting on the date and time agreed during the booking process.

Planning End-point Assessment Dates

Prior to the End-point Assessment taking place, providers/employers will receive automated emails with:

- Confirmed start time and expected duration of the assessments
- Access to all relevant systems and resources

ID Requirements

VTCT Skills will verify the identity of the Apprentice before they undertake the assessment. All employers are therefore required to ensure that each apprentice has photographic identification with them on the day of assessment.

VTCT Skills will accept the following as proof of identity:

- A valid passport
- A signed UK photo card driving licence
- Employee ID card or travel card

The Independent Assessor will certify that they have seen valid identification before proceeding with an End-point Assessment and confirm the correct spelling of the Apprentice's name in readiness for certification.

Appeals

Any appeals in relation to the outcome of the End-point Assessment will be managed by VTCT Skills whose decision is final.

Cancellation

Under some circumstances, it may be necessary to cancel an End-point Assessment. Should this happen, providers/employers must contact the End-point Assessment team immediately. Please note that if a cancellation occurs within 10 working days of the assessment taking place, there will be a cancellation charge applied in line with VTCT Skills 'Cancellation Policy'.

If the customer cancels the End-point Assessment:

- Prior to the date of the End-point Assessment, the customer must inform VTCT Skills by email (epa@vtctskills.org.uk)
- On the day of the End-point Assessment, the customer must inform VTCT Skills by telephone (0121 270 5100)

Cancellation of an End-point Assessment within 10 working days prior to the assessment taking place will incur the **full cost** of the End-point Assessment. For further details, the cancellation policy is available on the booking platform or on VTCT Skills website.

Should the Apprentice wish to re-sit later, a new booking form should be made on epaPRO.

Overview of the End-point Assessment Period

Once the Apprentice has submitted their evidence at the End-point Assessment gateway stage, they will then enter the End-point Assessment period.

Please note:

A maximum of one apprentice can be assessed at any one time by the Independent Assessor during assessment method 1, 2 & 3.

The Customer Service Specialist End-point Assessment consists of three assessment methods:

Assessment Method	Assessed by	Overall Grading
Assessment Method 1: Practical observation with questions and answers	Independent Assessor	Fail/Pass/Distinction
Assessment Method 2: Work-based project, supported by an interview	Independent Assessor	Fail/Pass/Distinction
Assessment Method 3: Professional discussion supported by portfolio evidence	Independent Assessor	Fail/Pass/Distinction

Length of End-point Assessment Period

The End-point Assessment will be completed within a period lasting typically three months, beginning when VTCT Skills has confirmed that all the gateway requirements have been met by the Apprentice.

If an End-point Assessment method is not achieved, the failed assessment method should be re-sat or re-taken within the End-point Assessment period, and in accordance with the requirements outlined in the 'Customer Service Specialist Assessment Plan'.

Order of Assessment Methods

Although there is flexibility in the order in which each assessment method is carried out, it is recommended that:

- The work-based project takes place before the professional discussion
- The practical observation can be before or after the work-based project but it is recommended not before the professional discussion

How the End-point Assessment is Graded

The overall grade for the End-point Assessment will be based on the grades achieved in the three assessment methods.

All End-point Assessment methods must be passed for the End-point Assessment to be achieved overall.

Assessment Method 1: Practical observation with questions and answers

The practical observation with questions and answers will be graded a Fail/Pass/Distinction against the grading criteria.

Assessment Method 2: Work-based project, supported by an interview

The work-based project, supported by an interview will be graded a Fail/Pass/Distinction against the grading criteria.

Assessment Method 3: Professional discussion supported by portfolio evidence

The professional discussion supported by portfolio evidence will be graded a Fail/Pass/Distinction against the grading criteria.

Overall Grading

Performance in the End-point Assessment determines the overall apprenticeship grade of:

- Fail
- Pass
- Distinction

The grades from each individual assessment method are combined to determine the overall grade. If the Apprentice fails one or more assessment methods, they will be awarded an overall **End-point Assessment Fail**.

To achieve an overall **End-point Assessment Pass**, the Apprentice should achieve at least a Pass in all three assessment methods.

To achieve an overall **End-point Assessment Distinction**, the Apprentice must achieve a Distinction in all three assessment methods.

Grades from the individual assessment methods will be combined in the following way to determine the overall grade of the End-point Assessment:

Practical Observation with Questions and Answers	Work-based Project, Supported by an Interview	Professional Discussion Supported by Portfolio Evidence	Overall Grading
Fail	Any grade	Any grade	Fail
Any grade	Fail	Any grade	Fail
Any grade	Any grade	Fail	Fail
Distinction	Pass	Pass	Pass
Pass	Distinction	Pass	Pass
Pass	Pass	Distinction	Pass
Distinction	Distinction	Pass	Pass
Pass	Distinction	Distinction	Pass
Distinction	Pass	Distinction	Pass
Distinction	Distinction	Distinction	Distinction

Assessment Method 1

Practical Observation with Questions and Answers

The practical observation with questions and answers is covered in one session, lasting **60 minutes** +/- 10% tolerance either way.

The Apprentice must be observed, by an Independent Assessor, undertaking a range of day-to-day workplace activities. The observation should involve activities which allow the Apprentice to demonstrate the full range of their Knowledge, Skills and Behaviours required.

Delivery

The practical observation must include questioning to clarify knowledge and understanding is being applied. Questions must be open questions and the Independent Assessors may ask supplementary questions as required to seek further clarification. Supplementary questions will be devised by the Independent Assessor as required.

During the practical observation the Apprentice should have the opportunity, if required, to move from one area/function of the business to another in order to best demonstrate how they have applied their Knowledge, Skills and Behaviours (KSBs) in a realistic work environment to achieve genuine and demanding work objectives.

The amount of questioning time carried out during the observation should not exceed 15% of the total time allowed for the practical observation.

The practical observation must:

- Reflect typical working conditions
- Allow the Apprentice to demonstrate all aspects of the standard being assessed
- Take a synoptic approach to assessment the overall competence
- Be carried out on a one-to-one basis

The Apprentice must be given two weeks' notice of the practical observation. The observation can be before or after the work-based project, but it is recommended **not** to be before the professional discussion. Independent Assessors must grade the practical observation as Fail, Pass or Distinction using the grading criteria.

Venue

The End-point Assessment practical observation with questions and answers must take place in a suitable venue selected by VTCT Skills for example, the employer's premises.

The Independent Assessor must plan the practical observation in conjunction with the Apprentice and their employer, taking account of workplace considerations. This would typically include timing, the right environment and enough space for the Apprentice to be able to do their job.

Knowledge, Skills and Behaviours

The End-point Assessment practical observation with questions and answers will cover the following Knowledge, Skills and Behaviours:

Knowledge

Knowledge Criteria
Knowing your customers and their needs/customer insight
How to analyse, use and present a range of information to provide customer insight.
Understand different customer types and the role of emotions in bringing about a successful outcome.
Understand how customer expectations can differ between cultures, ages and social profiles.
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.

Skills

Skills Criteria
Business focused service delivery
Find solutions that meet your organisation's needs as well as the customer requirements.
Providing a positive customer experience
Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes.
Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy.
Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps.
Identify where highs and lows of the customer journey produce a range of emotions in the customer.
Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format.
Customer service performance
Maintain a positive relationship even when you are unable to deliver the customer's expected outcome.
When managing referrals or escalations take into account historical interactions and challenges to determine next steps.

Behaviours

Behaviours
Ownership/responsibility
Personally, commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation.
Exercises proactivity and creativity when identifying solutions to customer and organisational issues.
Team working
Work effectively and collaboratively with colleagues at all levels to achieve results.
Recognise colleagues as internal customers.
Equality
Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer.
Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment.
Presentation
Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.
Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand.

Practical Observation with Questions and Answers

Fail Criteria

Grading Descriptors	
Grading Criteria	Fail
The Apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the Pass criteria.	
Shows a little or no understanding of their role in meeting the organisation's customer service standard.	
Does not fully know or understand their organisation's service level agreement.	
Provides insufficient evidence to demonstrate an understanding of customer expectations.	

Practical Observation with Questions and Answers

Pass Criteria

The Apprentice will achieve a Pass grade if they provide evidence to meet all the Knowledge, Skills and Behaviour requirements set out for the practical observation with questions and answers and all the criteria below:

Grading Descriptors		
Grading Criteria	Fail	Pass
An ability to assess at least three different customer types and their role of emotions in order to achieve a successful outcome for them.		
Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.		
Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction.		
An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.		
Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.		
Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.		
Recognises when customer emotions have been affected by the level of service offered.		

Grading Descriptors (continued)		
Grading Criteria	Fail	Pass
Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.		
Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.		
Evidences when they have maintained a positive relationship even when they are unable to deliver the customer's expected outcome.		
Evidences how they recognise when customer expectations are not met and demonstrates how, using appropriate communication techniques, this could be managed to maintain a positive relationship.		
Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.		
Shows proactivity and creativity when identifying solutions to customer and organisational issues.		
Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures.		
Demonstrates achievement of results through effective teamwork and collaboration with colleagues at all levels.		
Shows adaptability of own skills when working with internal customers.		
Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.		
Evidence to show how their personal presentation made a positive impact on their organisation's brand.		
Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.		
Demonstrates how they analyse, use and present a range of information in order to provide customer insight.		

Practical Observation with Questions and Answers

Distinction Criteria

The Apprentice will achieve a Distinction grade in the practical observation with questions and answers if they provide evidence to meet all the Pass criteria and all the Distinction criteria below:

Grading Descriptors	
Grading Criteria	Distinction
Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.	
Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.	

Notes

Use this area for notes and diagrams.

Assessment Method 2

Work-based Project, Supported by an Interview

In the work-based project, supported by an interview, an Independent Assessor will ask the Apprentice questions. This gives the Apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

Work-based Project

Apprentices must submit a written report, on a project they have carried out, to VTCT Skills (EPAO) two weeks prior to an interview date. This date will be agreed when the Apprentice passes through the gateway process.

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 subject of the project report should be agreed with VTCT Skills with guidance from the employer, in order to allow them to comment on appropriateness for their business, but VTCT Skills must make a decision to ensure consistency.

The subject should cover a specific high-level challenge (such as a complaint or difficult situation) that the Apprentice has dealt with explaining what it was, what actions (planning and execution), the tools, what solutions were offered, details of any recommendations made to change a policy or process and any feedback from the customer. Details should also include the Apprentice's responsibilities and results.

The report should contain annexes that are attributable to the Apprentice and the actions they took. Example evidence could be emails, letters, meeting notes, call logs, workflow documents or feedback.

Although there is flexibility in the order in which each assessment method is carried out, it is **recommended** that the written work-based project takes place **before** the professional discussion. The work-based project is designed to ensure the Apprentice's learning meets the needs of the business and is relevant to their role. The employer will ensure the Apprentice has sufficient time and the necessary resources to plan and undertake the research and produce the written report.

Interview (Work-based Project)

- The work-based project will be supported by an interview
- The interview will take place with an Independent Assessor
- The interview will last for 60 minutes (+/- 10%)
- The interview will focus on the written project and any supporting annexes

Venue

The interview must take place in a suitable venue selected by VTCT Skills with the employer for example, the employer's premises. The interview can take place either face-to-face or via online video conferencing, if appropriate. The interview should take place in a suitable controlled environment - a quiet room, free from distractions and influence.

Knowledge, Skills and Behaviours

The End-point Assessment Work-based project, supported by an interview will cover the following Knowledge, Skills and Behaviours:

Knowledge

Knowledge Criteria
Business, Knowledge and Understanding
Understand your organisation's current business strategy in relation to customers and make recommendation for its future.
Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation.
Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions.
Customer Journey knowledge
Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience.
Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation.
Customer service culture and environment awareness
Understand your business environment and culture and the position of customer service within it.
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.

Skills

Skills criteria
Business focused service delivery
Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice.
Providing a positive customer experience
Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction.
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.
Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service.
Service improvement
Analyse the end-to-end service experience, seeking input from others where required supporting development of solutions.
Make recommendations based on your findings to enable improvement.
Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice.

Work-based Project, Supported by an Interview

Fail Criteria

Grading Descriptors	
Grading Criteria	Fail
The Apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the Pass criteria.	
Fails to recommend improvements in customer service provision.	
Does not demonstrate an understanding of customer journeys.	
Shows limited ability in understanding customer journeys to ensure successful outcomes.	

Work-based Project, Supported by an Interview

Pass Criteria

The Apprentice will achieve a Pass grade if they provide evidence to meet all the Knowledge, Skills and Behaviour requirements set out for the work-based project, supported by an interview and all the criteria below:

Grading Descriptors		
Grading Criteria	Fail	Pass
Evidence that they understand the impact of the organisation's mission statement and business strategy on customer service delivery and make recommendations for future improvements.		
Ability to recommend improvement to the customer service provision, the steps required to implement this change and the benefit this change could have on the organisation and their own role.		
Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.		
An understanding of the underpinning business processes that support them on bringing about the best outcome for customers and their organisation.		
Provides evidence to show how they identify information which can be used by their organisation to provide customer insight and identify how this information can be analysed, used and presented.		
Ability to discuss the internal and external factors influencing their business environment and culture.		

Grading Descriptors (continued)

Grading Criteria	Fail	Pass
Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery.		
Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.		
Ability to identify potential causes of service failure and the consequences of these.		
Evidences when they made decisions and recommendations to improve their own customer service delivery.		
Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.		
Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements.		
Ability to gather and analyse information about the types of customers their organisation has and explain how the service they provide meets their potential needs and expectations.		
Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.		
Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required.		
Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.		

Work-based Project, Supported by an Interview

Distinction Criteria

The Apprentice will achieve a Distinction grade in the work-based project, supported by an interview, if they provide evidence to meet all the Pass criteria and all the Distinction criteria below:

Grading Descriptors	
Grading Criteria	Distinction
Evidence to support their research and analysis of customer service standards and mission statements of other organisations, in comparison to their own organisations, to inform their recommendations.	
Ability to consider the possible impact on their organisation of not considering the future in decision-making.	
Demonstrates how knowing their customer and their needs has a direct impact on: <ul style="list-style-type: none"> • Their working practices • Organisational policy/procedures 	
Ability to demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation.	
Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s).	
Provides evidence to show when they analyse the risks and opportunities to implementing change.	
Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended alternative methods likely to improve results, stating reasons for choice.	
Evidence to show when they have proactively gathered customer feedback, through a variety of methods and used alternative recommendations to change the customer service level agreement in order to provide an improved service.	
Demonstrates an ability to identify trends/recurring issues and analyse why they occurred and record possible ways of addressing them to ensure they do not reoccur.	

Notes

Use this area for notes and diagrams.

Assessment Method 3

Professional Discussion Supported by Portfolio Evidence

The professional discussion supported by portfolio evidence will last for **60 minutes** (+/- 10%).

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.

This could include witness statements, customer feedback such as emails or letters, manager feedback from one-to-one or alike. The portfolio of evidence will not be directly assessed. Apprentices must submit the requested portfolio of evidence (10-15 pieces) to VTCT Skills two weeks prior to the professional discussion date. This date will be agreed when the Apprentice passes through gateway process.

This evidence will be considered by the Independent Assessor and used for the planning of the discussion.

Apprentices will be required to provide real-life examples of how they have applied knowledge and understanding whilst carrying out their job role. The professional discussion will ordinarily take place on the **same day** as the practical observation.

Venue

The professional discussion must take place in a suitable venue selected by VTCT Skills with the employer for example, the employer's premises. The professional discussion can take place either face-to-face or via online video conferencing, if appropriate. The professional discussion should take place in a suitable controlled environment - a quiet room, free from distractions and influence.

VTCT Skills have processes in place to verify the identity of the Apprentice and ensure the Apprentice is not being aided.

Knowledge, Skills and Behaviours

The End-point Assessment professional discussion supported by portfolio evidence will cover the following Knowledge, Skills and Behaviours:

Knowledge

Knowledge Criteria
Business, Knowledge and Understanding
Understand the impact your service provision has on the wider organisation and the value it adds.
Understand a range of leadership styles and apply them successfully in a customer service environment.
Customer journey knowledge
Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention.
Understand commercial factors and authority limits for delivering the required customer experience.
Knowing your customers and their needs/customer insight
Know your internal and external customers and how their behaviour may require different approaches from you.
Understand what drives loyalty, retention and satisfaction and how they impact on your organisation.
Customer service culture and environment awareness
Understand how to find and use industry best practice to enhance own knowledge.

Skills

Skills Criteria
Business focused service delivery
Resolve complex issues by being able to choose from and successfully apply a wide range of approaches.
Providing a positive customer experience
Demonstrate a cost-conscious mind-set when meeting customer and the business needs.

Behaviours

Behaviour Criteria
Develop self
Proactively keep your service, industry and best practice knowledge and skills up-to-date.
Consider personal goals related to service and take action towards achieving them.
Ownership/responsibility
Make realistic promises and deliver on them.
Team working
Share knowledge and experience with others to support colleague development.

Professional Discussion Supported by Portfolio Evidence

Fail Criteria

Grading Descriptors	
Grading Criteria	Fail
The Apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the Pass criteria.	
Does not understand the content and importance of the organisation's service level agreement.	
Demonstrates limited knowledge and understanding of whom the internal and external customers are and their expectations.	
Provides no knowledge and understanding of leadership styles.	
Gives ineffective evidence of personal learning and development goals and shows no understanding of how they can be achieved.	

Professional Discussion Supported by Portfolio Evidence

Pass Criteria

The Apprentice will achieve a Pass grade if they provide evidence to meet all the Knowledge, Skills and Behaviour requirements set out for the professional discussion supported by portfolio evidence and all the criteria below:

Grading Descriptors		
Grading Criteria	Fail	Pass
Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments.		
Evidence of how they identify the different types of leadership styles that work best in their customer environment.		
Demonstrates when they have balanced the meeting of their customer and their organisation's needs while showing they have considered cost implications.		
Demonstrate sharing own knowledge and experience with others, to support colleague development.		

Grading Descriptors (continued)		
Grading Criteria	Fail	Pass
Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.		
Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.		
Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations.		
Demonstrates responsibility and ownership in resolving customer issues, by getting the right people involved and delivering on promises, to the satisfaction of the customer and their organisation.		
Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.		
Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.		
Evidences knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development.		
Provides evidence to demonstrate how they have achieved learning and development goals, identified in an agreed personal development plan, in relation to their knowledge and skills of customer service, in the industry and best practice.		

Professional Discussion Supported by Portfolio Evidence

Distinction Criteria

The Apprentice will achieve a Distinction grade in the professional discussion supported by portfolio evidence, if they provide evidence to meet all the Pass criteria and all the Distinction criteria below:

Grading Descriptors	
Grading Criteria	Distinction
Evidences when they have assessed the impact of sharing their own knowledge on: <ul style="list-style-type: none">• Their development• Colleague development	
Evidences when they have analysed the importance of their professional image and its relationship with the organisation's brand.	
Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach.	

Notes

Use this area for notes and diagrams.

Re-sits and Re-takes

If the Apprentice fails any part of the End-point Assessment, further development must be provided prior to a re-sit or re-take. An apprentice should have a supportive action plan to prepare for a re-sit or a re-take.

A re-take requires the Apprentice to undertake further learning and therefore they would need to go through the gateway process again.

Apprentices are able to re-take/re-sit any individual assessment component where a Pass has not been achieved. If a re-take/re-sit is required, apprentices should complete re-take/re-sits within 12 months. There is no limit to the number of re-take/re-sits within the 12 months.

Re-sits and re-takes are not offered to an apprentice wishing to move from Pass to a higher grade.

An apprentice will only receive an End-point Assessment grade of a Pass for a re-sit or re-take, unless VTCT Skills determines there are exceptional circumstances.

If the Apprentice fails the work-based project they will be asked to rework their project taking account of feedback from the Independent Assessor. Apprentices will have one month to rework their submission.

The Apprentice will be able to submit previous evidence along with the new additional evidence. In the event of extenuating circumstances, apprentices can be given the opportunity to rearrange their date, subject to the agreement of the Independent Assessors.

Document history

Version	Details of amendments	Date
1	First Published	04/02/2025



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