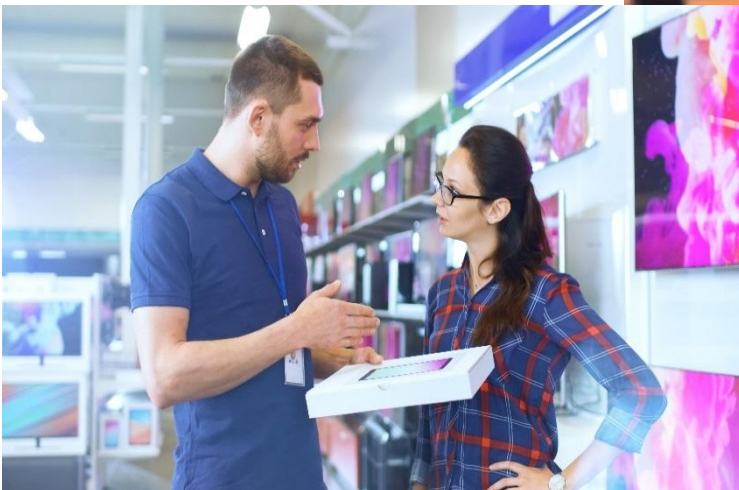


# Customer Service Practitioner Apprenticeship Standard – ST0072



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## Introduction

VTCT Skills is an approved End-point Assessment Organisation (EPAO) for the Customer Service Practitioner Level 2 Apprenticeship Standard. We have produced this toolkit to help you understand our approach to this standard.

To ensure that our assessments are robust, credible, and consistent, VTCT Skills will operate in accordance with the external quality assurance body appointed for this standard, Ofqual.

## The Customer Service Practitioner role

The role of a customer service practitioner is to deliver high-quality products and services to the customers of their organisation. This can be delivered from the workplace, digitally, or through visiting the customer's own locality.

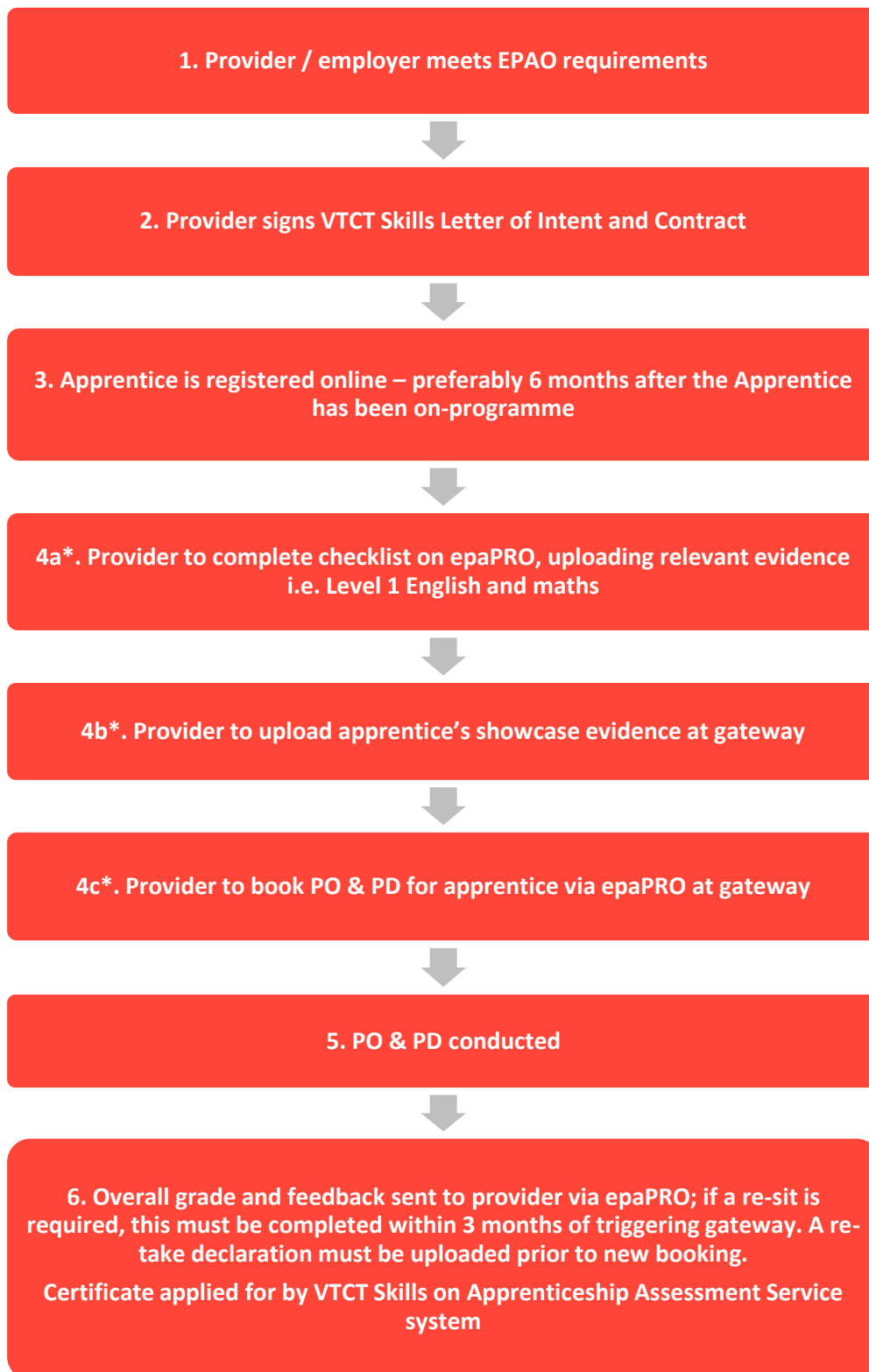
Customer contact may be one-off or routine and may include dealing with orders and payments, offering advice, guidance and support, sales, aftercare and service recovery. The apprentice may be the first point of contact and work in any sector or organisation type.

A customer service practitioner will demonstrate excellent customer service skills and behaviours as well as product and service knowledge. They will work in-line with their organisation's customer service standards and strategy and within appropriate regulatory requirements.

## Abbreviations

|                      |   |
|----------------------|---|
| <b>EPA</b>           | End-point Assessment                                  |
| <b>EPAO</b>          | End-point Assessment Organisation                     |
| <b>ASS</b>           | Apprenticeship Assessment Service                     |
| <b>the Institute</b> | Institute for Apprenticeships and Technical Education |
| <b>IEA</b>           | Independent End-point Assessor                        |
| <b>IQA</b>           | Internal Quality Assurer                              |
| <b>LIEA</b>          | Lead Independent End-point Assessor                   |
| <b>KSB</b>           | Knowledge Skills & Behaviour                          |
| <b>PO</b>            | Practical Observation                                 |
| <b>PD</b>            | Professional Discussion                               |
| <b>epaPRO</b>        | VTCT Skills End-point assessment system               |

## End-point Assessment Process



***NB. Stage 4a, 4b, and 4c must be completed at the same time***

## The Gateway

The End-point Assessment (EPA) takes place after a minimum of 12 month's on-programme learning. The employer, in conjunction with the training provider, will formally sign off that the apprentice has met the minimum requirements in regard to the knowledge, skills, and behaviours outlined in the standard. The apprentice, employer, and provider will confirm that the apprentice has achieved Level 1 English and Maths. The apprentice must also confirm that they feel ready to move on to their EPA.

A copy of the standard should be available during the gateway meeting to ensure all parties have a clear overview of what is required:

<https://skillsengland.education.gov.uk/apprenticeship-standards/st0072-v1-1>

VTCT Skills has a process in place to support apprentices who have any additional learning requirements. Please refer to the VTCT Skills Reasonable Adjustments and Special Considerations policy for further information, this is available on our website.

## Registering an apprentice

When registering an apprentice, the provider is required to submit the following information: ULN, full name, date of birth, standard, assessment type, and expected EPA date. It is important to ensure that the apprentice's personal details are correct, as these will appear on their certificate. There will be costs associated with the request for a replacement certificate.

## Booking an end-point assessment

An apprentice's EPA can be booked via the VTCT Skills online system epaPRO. EPA bookings must be made a minimum of 20 working days in advance of the desired assessment date(s):

- ✓ Providers must confirm that the apprentice has completed all of the mandated components of the Standard via completion of the checklist on epaPRO.
- ✓ Preferred dates of assessment need to be indicated; the VTCT Skills EPA team will seek to match an IEA and accommodate the request.
- ✓ The EPA team will formally confirm the booking by email and via epaPRO.

## Remote assessments

Assessments will ordinarily be conducted through via Teams (live stream), a video conferencing platform provided through epaPRO. The apprentice will receive automated emails containing a link to Teams within 72 hours of the assessment being booked. Each link is required by the apprentice to complete the relevant assessment.

For further information on Teams, our Teams Guidance for Apprentices document is available via epaPRO.

## Planning assessment dates

Prior to the assessment taking place, you will be contacted by the VTCT Skills EPA team to:

- ✓ Establish a named contact for that specific IEA
- ✓ Share contact details between the IEA and customer
- ✓ Confirm start time and expected duration of the assessments
- ✓ Access all relevant customer systems and resources

## Cancellation

Under some circumstances, it may be necessary to cancel an EPA. In this event, you must contact the EPA team to inform them. Please note, a fee may be chargeable for some or all of the EPA costs, depending on the circumstances. The EPA team will contact you to discuss the cancellation and discuss future availability. Further details can be found within our cancellation policy on the VTCT Skills website. Should the apprentice wish to re-sit at a later date a new booking form will be required.

## ID requirements

VTCT Skills will need to ensure that the person undertaking an assessment is the person they claim to be so please ensure the ID is presented at the time of the Assessments. VTCT Skills will accept the following as proof of the apprentices' identity:

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

The IEA will certify they have seen ID before proceeding with an assessment and confirm the correct spelling of the name in readiness for certification.

## The End-point Assessment

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

## Apprentice Showcase

The apprentice showcase is compiled after 12 months of on-programme learning, it enables apprentices to reflect and present examples of their development over the whole on-programme period.

The apprentice showcase will be reviewed and assessed by the IEA. The evidence contained in the apprentice showcase will be assessed against the following areas of the standard:

- ✓ Understanding the organisation
- ✓ Meeting regulations and legislation
- ✓ Systems and resources
- ✓ Product and service knowledge
- ✓ Influencing skills
- ✓ Personal organisation
- ✓ Dealing with customer conflict and challenge
- ✓ Developing self

- ✓ Being open to feedback
- ✓ Team working

The apprentice showcase can be presented to the IEA face-to-face or remotely using epaPRO login, depending on the needs of the apprentice and the employer.

It can be showcased through the delivery of a presentation or by a virtual form of assessment such as submission of a report, storyboard, journal etc. This must be uploaded to epaPRO. Only evidence uploaded as part of the showcase will be considered, therefore all evidence selected by the apprentice must be made available. Any evidence post-assessment will not be considered. If the showcase is remote, please book and upload all relevant evidence to epaPRO at least 20 days prior to the observation and the professional discussion taking place.

It is expected that the apprentice showcase will include a range of work-based evidence, including:

- ✓ customer feedback
- ✓ recordings (ensure the showcase evidence is time tagged)
- ✓ manager statements
- ✓ witness statements
- ✓ mid and end-of-year performance reviews and feedback

Within this Showcase assessment, the Apprentice may be required to complete an interview on any area that may need expanding on or the IEA feels need more information to support a higher grade. Providing an opportunity for IEA to delve deeper in to the learning and experience. This is to ensure rigor, competence, and independence

### **Practical Observation (PO)**

The PO will be pre-planned and scheduled to when the apprentice will be in their normal place of work and, will be carried out by the IEA over a minimum of one hour. This assessment can be completed remotely using a live stream, or face-to-face, whichever is best suited for the Apprentice. The observation should enable the apprentice to evidence their skills, knowledge, and behaviour within the standard to demonstrate genuine and demanding work objectives. Each situation within the observation will be different, and examples are, handling a general enquiry, dealing with a customer complaint or a need for further information or detail, but it is mandatory that the observation covers as a minimum: presentation, equality, interpersonal skills, communication, and personal, organisation. Those areas of the standard which are not able to be evidenced during the observation will be discussed subsequently as part of the professional discussion with the IEA.

All of the evidence criteria used within this component have been taken directly from the Customer Service Practitioner Level 2 standard assessment plan.

### **Professional Discussion (PD)**

The PD will be conducted against set criteria and will also clarify any questions the IEA has from their assessment of the learner journey and practical observation. This will need to take place in a suitable environment, free from distraction in a quiet area, and should be a maximum of one hour. This assessment can also be completed remotely via epaPRO or face to face whichever is best suited for the employer and Apprentice.

Apprentices will take part in a professional discussion based on the standard outcomes and designed to draw out evidence against the grade criteria.

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 take place on the same day as the practical observation.

### **Feedback**

The IEA will provide a summary of the assessment that has taken place and allow the apprentice the opportunity to ask questions, comment on the session or provide feedback should they wish to. If the apprentice has any questions / comments or feedback, the IEA should record this on the assessment record.

However, the IEA will not provide the apprentice (or their manager) with a preliminary grade, as it will be subject to the internal quality assurance processes. VTCT Skills will aim to confirm the apprentice's final and overall grade approximately 10 working day following the last assessment.

### **Access arrangements**

It is important that apprentices are able to access all types of assessments to demonstrate KSBs. Where apprentices have disabilities, learning difficulties, or temporary injuries that may disadvantage them, a reasonable adjustment should be applied for prior to booking via email, when the Reasonable Adjustment /Special Consideration has been approved a reference will be sent to add to the booking, this will also be added to epaPRO via notes for reference and confirmation.

It is the responsibility of the provider to apply for these arrangements on behalf of the apprentice prior to the EPA taking place. For more information on access arrangements, please refer to the VTCT Skills Reasonable Adjustment Policy and Special Consideration Policy via the EPAO page on the VTCT Skills website.

### **Re-sitting / Retaking end-point assessment**

**Re-sit** – an apprentice will be able to undertake a re-sit where there are extenuating circumstances which will impact the assessment grade e.g. illness, accident on the way to the test etc. The apprentice must provide evidence in order for a re-sit decision to be made.

**Retake** – an apprentice will be able to retake an assessment but must evidence additional learning has taken place. A re-take declaration is required for those apprentices that fail an assessment (Appendix 2, this must be uploaded prior to the new booking being sent to bookings. This document can also be found on epaPRO should it be required,

For the Customer Service Practitioner Level 2 standard, the following guidance from the ESFA applies:

*“If a learner is doing a re-take for a Customer Service Practitioner standard and they FAIL they can re-take the assessment. If they then pass at the second attempt, regardless of the amount of work they do, they will only receive a PASS mark”.*

### **Re-sit / Retake fees**

The fees for re-sits / retakes will be agreed upon with the Head of Assessment Services at VTCT Skills and the Employer / Provider.

Employers and training providers should agree in advance who will pay for re-sits / retakes not included in their contract. Employers are expected to financially support apprentices until completion of their apprenticeship, including paying the cost of re-sits / retakes, when necessary. Re-sits / retakes are ineligible costs and are not funded by the ESFA. Although the training provider is not responsible for re-sit / retake

costs but may agree to contribute and can include this in their agreement at the beginning of the apprenticeship.

### **Results**

Following the completion of all assessments, the IEA will send all completed marking sheets and feedback reports to the EPA Moderation team, who will then provide final grades following IQA/moderation. These final grades will be submitted to the Apprenticeship Assessment Service via the portal within 10 days of the final grade being awarded. The AAS will then issue an Apprenticeship completion certificate for the standard; a copy of the certificate number along with the date will then be input onto the apprentice's record on epaPRO by VTCT Skills.

These certificates will confirm that the apprentice has passed the EPA and has demonstrated full competency across the standard. They will be sent to the employer for distribution and celebration. We would advise providers to check with employers that the certificate has been received and a copy has been taken for their records. Should the Certificate need to be sent directly to the Apprentice, this must be agreed upon by the employer and correct information added to epaPRO prior to EPA completion.

### **Appeals**

Should an apprentice or employer wish to appeal the grade received, please refer to the VTCT Skills Appeals Policy, which is available via epaPRO or alternatively on the website.

<http://www.vtctskills.org.uk/end-point-assessment/>

## Evidence Summary CSPL2

The guidance grid below shows suggested assessment methods and evidence types that can be used to cover skills, knowledge and behaviour criteria within the showcase component, as outlined in the assessment plan.

| Standard   | What the Independent End-point Assessor is looking for  | Suggested evidence  | Suggested method   |
|--|---|---|--|
| Know the purpose of the business and what 'brand promise' means.   | You understand the sector that your organisation is in, its aims and purpose.<br>You understand what the organisation does / provides and what the brand promise is.                                | Research activity to gain underpinning knowledge about organisational sectors.<br>Communications with customers / documents produced:<br>- company overview / introductions<br>- promises made to customers<br>- marketing material provided<br>- policy documents  | Learning journal<br>Product evidence   |
| Know your organisation's core values and how they link to the service culture.   | You are clear on what core values are and how these are displayed within the organisation.<br>You know what service culture is and how the organisation's service culture links to its core values. | Research activity to gain underpinning knowledge about core values and service culture.<br>Examples of how you demonstrate the organisations core values and service culture in your behaviour with customers.  | Learning journal<br>Product evidence<br>Reflective account   |
| Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation. | You have a good awareness and knowledge of the organisation's internal policies and procedures, and the impact that they could have on customer service.  | Research activity to gain underpinning knowledge about the organisations policies and procedures.<br>Examples of how you follow company policies and procedures, the complaints process and adhere to digital media policies  | Learning journal<br>Product evidence<br>Reflective account   |
| <b>Distinction Criteria</b><br>To achieve a distinction grade within this module you must pass 100% of the pass criteria                                 | You understand, and can explain, how the organisation's policies and procedures impact on the delivery of customer service  | Specific examples from your own practice of how your organisation's policies and procedures impact on the delivery of customer service within your company, when you have referred to them and / or applied them within your role.<br>Research activity to gain further knowledge about the organisation's policies and procedures, and how these apply to customer service and your own role | Report analysis<br>Audio/video recordings<br>Witness statement<br>Product evidence<br>Reflective account |
| Know the appropriate legislation and regulatory requirements that affect your business.  | You can understand regulations and legislation that apply to your organisations product / service and how this impacts on customer service i.e. consequences of failure.                            | Research activity to gain underpinning knowledge about organisational related legislation and regulation<br>Correspondence with customers, managers, regulatory bodies / documents produced:  | Learning journal<br>Product evidence<br>Reflective account   |

|  |  |   |   |
|--|--|---|---|
|  |  | <ul style="list-style-type: none"> <li>-emails / letters</li> <li>-signposting</li> <li>-policy documents</li> </ul>  |   |
| <b>Distinction Criteria</b><br>To achieve a distinction grade within this module you must pass 100% of the pass criteria | You understand and can explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations associated with your employer and the sector | Research activity to gain further knowledge about organisational related legislation and regulation<br>Examples of possible consequences for your company and for yourself of not adhering to policies and process<br>Correspondence with customers, managers, regulatory bodies / documents produced:<br><ul style="list-style-type: none"> <li>- emails / letters</li> <li>- signposting</li> <li>- policy documents</li> </ul> | Report analysis<br>Audio/video recordings<br>Witness statement<br>Product evidence<br>Reflective account                  |
| Know your responsibility in relation to this and how to apply it when delivering service.                                | You understand and can apply organisational rules and follow relevant procedures when delivering a service.  | Research activity to gain underpinning knowledge about confidentiality and the Health and Safety at Work Act (1974).<br>Correspondence with customers, colleagues, managers / documents produced:<br><ul style="list-style-type: none"> <li>- email / letters</li> <li>- call recordings</li> <li>- Minutes of meetings</li> </ul>  | Learning journal<br>Product evidence<br>Video / Audio recording<br>Reflective account                                     |
| <b>Distinction Criteria</b><br>To achieve a distinction grade within this module you must pass 100% of the pass criteria | Explain how a code of practise or ethical standards affects customer service   | Recognise your own organisation's code of practice and / or ethical standards<br>Examples of how a code of practise or ethical standards affects customer service specifically within your sector<br>Explanation of the benefits and advantages to your organisation and your customers of having a code of practise  | Audio/video recordings<br>Witness statement<br>Product evidence<br>Reflective account<br>Story boards<br>Learning journal |
| Know how to use systems, equipment and technology to meet the needs of your customers.                                   | You have good understanding of the systems, equipment and technology that can be used to meet the needs of customers and know how to use them.   | Research activity to gain underpinning knowledge about the organisation's systems, equipment and technology<br>Examples of how you use systems, equipment and technology to support customer needs  | Learning journal<br>Product evidence<br>Reflective account  |
| Understand types of measurement and evaluation tools available to monitor customer service levels.                       | You understand how customer service levels are monitored and evaluated using types of measurement and evaluation.  | Research activity to gain underpinning knowledge about the organisation's customer service measures and evaluation tools.<br>Examples of how you use measures and evaluation tools:<br>copies of surveys / questionnaires<br>customer feedback, specifically in relation to you and your customer service delivery  | Learning journal<br>Product evidence<br>Reflective account  |

|   |   |   |   |
|---|---|---|---|
| Understand the products or services that are available from your organisation and keep up-to-date.  | You have a good awareness and knowledge of the organisations products / services, their features and benefits.<br>You maintain and update your product / service knowledge, as appropriate.   | Research activity to gain underpinning knowledge about the organisations products / services  | Learning journal<br>Product evidence<br>Reflective account<br>Manager statement   |
| <b>Distinction Criteria</b><br>To achieve a distinction grade within this module you must pass 100% of the pass criteria                                      | Explain why it is important to update your knowledge on the organisations products and/or services  | Give examples of when you updated your knowledge on products and/or services<br>Explain the importance of updating product and/or service knowledge, and the possible consequences of not doing so  | Audio/video recordings<br>Managers statement<br>Reflective account<br>Product evidence<br>Learning journal<br>Training Log  |
| Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation. | You can openly demonstrate the ability to offer products / services options to customers, with appropriate knowledge of their needs and requirements.<br>You can demonstrate the ability to handle customer objections in a positive and professional manner. | Correspondence with customers (in which you provide information and offer more than one product / service option to meet their needs and requirements)<br>Call recordings (in which you provide information and offer more than one product / service option to meet their needs and requirements)<br>Letters/emails of gratitude received from customers about you<br>Customer notes                   | Manager statement<br>Witness statement<br>Reflective account<br>Product evidence<br>Performance reviews<br>Report (showing KPI's met/exceeded, graphs / charts to show performance levels)<br>Video / Audio recording |
| <b>Distinction Criteria</b><br>To achieve a distinction grade within this module you must pass 100% of the pass criteria                                      | Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached   | Correspondence with customers<br>Call recordings (in which you provide information and offer more than one product<br>Letters/emails of gratitude received from customers about you<br>Provide strong example of when you have followed protocol and done everything in your power to resolve an issue but the customer is still not satisfied.<br>Examples of when you have done signposted a customer | Manager statement<br>Reflective account<br>Product evidence<br>Performance reviews<br>Customer feedback<br>Mystery shopper<br>Reports<br>Signposting<br>Testimonies   |
| Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines.   | You have the ability to prioritise and plan the completion of tasks and meet deadlines.<br>You monitor the progress of tasks and adjust accordingly.  | To do lists<br>Calendar entries<br>Progress charts<br>Diary entries<br>League tables  | Product evidence<br>Manager statement<br>Performance reviews<br>Report (showing KPI's met/exceeded, graphs / charts to show performance levels)   |

|  |   |  |  |
|--|---|--|--|
| <b>Distinction Criteria</b><br>To achieve a distinction grade within this module you must pass 100% of the pass criteria | Respond in a professional manner to challenges and changes and adjust your priorities accordingly   | Explain how changes and challenges within the organisation may impact on priorities and/or KPI's<br>Give examples of when you had to adjust priorities within the company and how you dealt with this in a professional manner<br>Diary<br>To do lists | Product evidence<br>Manager statement<br>Performance reviews<br>Report (showing KPI's met/exceeded, graphs / charts to show performance levels)<br>Customer satisfaction |
| Demonstrate patience and calmness.   | You have the ability to stay patient, calm and empathetic when dealing with challenging customer situations.<br>You use effective customer service skills to take ownership of customer issues such as listening and asking questions.  | <ul style="list-style-type: none"> <li>- Call recordings</li> <li>- Emails / letters</li> <li>- Customer notes</li> <li>- Escalation records</li> </ul>  | Product evidence<br>Video / Audio recording<br>Manager statement<br>Witness statement<br>Reflective account  |
| Show you understand the customer's point of view.  | You understand the customers issue / view / comment / concerns and respond appropriately.   | Customer feedback on your customer service provision<br>Manager feedback<br>Quality assurance/audit feedback<br>Call recordings<br>Customer notes<br>Emails / letters  | Product evidence<br>Manager statement<br>Witness statement<br>Video/audio recording<br>Reflective account<br>Performance review  |
| Use appropriate sign-posting or resolution to meet your customers' needs and manage expectations.                        | You know how to resolve or when to refer / escalate a customer conflict or challenging situation and keep the customer satisfied that the situation is being dealt with.<br>You have the ability to follow relevant organisational policies / procedures when dealing with customer conflict and challenge. | Correspondence with customers<br>Call recordings<br>Customer feedback on your customer service provision<br>Customer notes<br>Escalation records   | Product evidence<br>Video/audio recording<br>Manager statement<br>Witness statement<br>Reflective account<br>Performance review  |
| Maintain informative communication during service recovery.  | You can demonstrate how you actively inform the customer of what is being done to resolve their issue and make accurate records.  | Notes or updates on system you have documented<br>Emails / letters of correspondence you have written<br>Call recordings<br>Customer feedback  | Product evidence<br>Manager statement<br>Witness statement<br>Reflective account<br>Video/audio recording  |
| <b>Distinction Criteria</b><br>To achieve a distinction grade within this module   | Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met   | Demonstrate your ability to deal with customer issues, needs and expectations<br>Examples of how you have dealt with an issue from start to finish to make ensuring customer satisfaction and the issue has been resolved.                             | Product evidence<br>Manager statement<br>Performance reviews<br>Customer satisfaction  |

|  |  |   |  |
|--|--|---|--|
| you must pass 100% of the pass criteria  |  |   | Mystery Shopper  |
| Take ownership for keeping your service knowledge and skills up-to-date.   | You ensure you have current product / service information knowledge and update yourself regularly.   | Training log<br>Personal development plan<br>Self-assessment activities   | Learning journal<br>Product evidence<br>Manager statement<br>Diary entries   |
| Consider personal goals and propose development that would help achieve them.  | You regularly update your own personal development and actively seek to improve your own knowledge and performance.                                | Personal development reviews<br>Appraisals<br>Continuous professional development activities<br>Training log<br>Research activity   | Learning journal<br>Product evidence<br>Manager statement<br>Diary entries   |
| <b>Distinction Criteria</b><br>To achieve a distinction grade within this module you must pass 100% of the pass criteria | Review the effectiveness of your personal development plan and update accordingly  | Give examples of your personal development and how this has helped you in your customer service role: <ul style="list-style-type: none"> <li>- Training courses</li> <li>- Sector specific research opportunities (articles, samples, posters etc)</li> <li>- Shadowing colleagues</li> <li>- Show evidence that your goals and targets are being reviewed on an ongoing basis</li> </ul> | Learning journal<br>Product evidence<br>Manager statement<br>Regular reviews<br>121 meetings<br>Personal development plan              |
| Act on and seek feedback from others to develop or maintain personal service skills and knowledge.                       | You value and utilise all opportunities for feedback and evaluation, understanding the benefits and acting on them to further improve and develop. | Colleague feedback<br>Customer feedback<br>Appraisal<br>One to one notes<br>Minutes of meetings you have actively participated in   | Product evidence<br>Manager statement<br>Witness statement   |
| Frequently and consistently communicate and work with others in the interest of helping customers efficiently.           | You engage in development activities to improve service delivery, communication, team working, and working with customers.                         | - Examples of networking<br>- Examples of team training<br>- Examples of team building activities you have attended<br>- Minutes of team meetings<br>- Team action plans<br>- Correspondence with colleagues, Manager and other departments   | Product evidence<br>Audio/visual recording<br>Manager statement<br>Witness statement<br>Reflective account<br>Journal<br>Presentations |
| <b>Distinction Criteria</b><br>To achieve a distinction grade within this module   | Recognise when to adapt personal behaviours and communication approach to meet the needs of the team members and the customer                      | Explain the difference in your behaviour and communication when working with team members and customers<br>Examples of networking   | Audio/visual recording<br>Manager statement<br>Witness statement   |

|   |  |   |  |
|---|--|---|--|
| you must pass 100% of the pass criteria   |  | <p>Examples of team training</p> <p>Examples of team building activities you have attended</p> <p>Minutes of team meetings</p> <p>Correspondence with colleagues, Manager and other departments</p>     | <p>Reflective account</p> <p>Journal</p> <p>Presentations</p>  |
| Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice.         | You work with others to share best practice, using a range of appropriate methods.           | <p>Examples of handovers</p> <p>Example of team briefing</p> <p>Minutes of meetings you have been involved in</p> <p>Examples of mentoring others</p>   | <p>Audio/visual recording</p> <p>Manager statement</p> <p>Witness statement</p> <p>Reflective account</p> <p>Presentations</p> <p>Product evidence</p> |
| <p><b>Distinction Criteria</b></p> <p>To achieve a distinction grade within this module you must pass 100% of the pass criteria</p> | Present reasoned ideas for improving customer service practice to the appropriate colleagues | <p>Examples of when you have presented ideas or suggestions for customer service improvements to colleagues and their responses</p> <p>Examples of mentoring others</p> <p>Input into Team meetings</p> | <p>Audio/visual recording</p> <p>Manager statement</p> <p>Witness statement</p> <p>Reflective account</p> <p>Journal</p> <p>Presentations</p>          |

**Appendix 1**
**Retake Declaration**

|                             |  |
|-----------------------------|--|
| <b>Apprentice Name</b>      |  |
| <b>ULN Number</b>           |  |
| <b>Date of Retake</b>       |  |
| <b>Name of Assessment/s</b> |  |

This is to confirm that the apprentice has undertaken a period of additional learning in the following area/s of the Customer Service Practitioner Standard:

| <b>Area/s of additional learning covered (Please list)</b> |
|--|
|  |

| <b>Declaration</b>   | <b>Signature</b> | <b>Date</b> |
|----------------------|------------------|-------------|
| Apprentice Signature |                  |             |
| Employer Signature   |                  |             |
| Provider Signature   |                  |             |

## Appendix 2

# Guidance for apprentices

### Introduction

VTCT Skills is an End-point Assessment Organisation (EPAO); you will be assessed by an Independent End-point Assessor (IEA) to ensure that you are meeting the requirements of the Customer Service Practitioner Apprenticeship Standard. The IEA will independently assess your competency after you have completed the on-programme training and learning.

Each IEA will carry identification as proof of whom they are before commencing an assessment. EPAs will be carried out by an IEA, who is an assessment expert and has the required occupational expertise within the sector. IEAs will carry out the range of required assessments securely and safely in your workplace or remotely. The IEA will not provide you (or your manager) with a preliminary grade, as it will be subject to the internal quality assurance process. Once all assessments have been completed and quality assured, your final grade will be available to view by your provider/employer on epaPRO approximately within 10 working days.

### Abbreviations

|               |   |
|---------------|---|
| <b>EPA</b>    | End-point Assessment                    |
| <b>EPAO</b>   | End-point Assessment Organisation       |
| <b>AAS</b>    | Apprenticeship Assessment Service       |
| <b>IEA</b>    | Independent End-point Assessor          |
| <b>IQA</b>    | Internal Quality Assurer                |
| <b>KSB</b>    | Knowledge Skills & Behaviour            |
| <b>PO</b>     | Practical Observation                   |
| <b>PD</b>     | Professional Discussion                 |
| <b>epaPRO</b> | VTCT Skills End-point assessment system |

### Your Identification (ID) requirements

VTCT Skills will need to ensure that you are the right person undertaking an assessment, therefore the IEA will need to see ID from you, and this can be:

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

The IEA will need to confirm they have seen your ID before they proceed, so please ensure you have this with you on the day. If a remote assessment is taking place via a virtual meeting room, you will still be required to show your identification prior to the assessment start. Failure to do so may result in the assessment being cancelled and a charge being incurred by your employer and/or provider.

Successful completion of EPA demonstrates that you are competent in your role and will result in the award of the apprenticeship certificate from the AAS. This certificate will be applied for by VTCT Skills and will be sent directly to your employer from the AAS.

The purpose of this document is to ensure you, the apprentice, know about the requirements within the Customer Service Practitioner Level 2 Apprenticeship Standard. This will help you to meet the assessment requirements.

Your apprenticeship standard is composed of the following assessment requirements:

### **On-programme training and learning**

On programme training and learning must meet the requirements set out in the apprenticeship standard. Your employer and provider will support you throughout your apprenticeship; this should take a minimum of 12 months.

### **Gateway to End Point Assessment (EPA)**

Once you have completed the relevant on-programme training and learning, you, your employer, and your provider will confirm that you are ready for EPA. Confirmation is via a Gateway meeting and once you have all agreed you are ready, you will be booked in for your EPA on an appropriate date for you.

### **End Point Assessment**

The EPA is the final assessment of your apprenticeship. It will test your knowledge, skills, and behaviours; the Customer Service Practitioner Level 2 Apprenticeship Standard is made up of three different assessment methods, the IEA will grade these as a fail, pass, or distinction. We have provided your employer and provider with guidance regarding what you will need to know and how to achieve a pass or distinction.

### **Methods of assessment**

The EPA methods for the Customer Service Practitioner Level 2 Apprenticeship Standard include the following three stages:

#### **1. Showcase**

It can be showcased by you to the IEA either face-to-face or remotely, depending on you and your employer's needs. This can be completed through the delivery of a presentation or by a virtual form of assessment such as submission of a report, storyboard, journal etc.

It is expected that the apprentice showcase will include a range of your work-based evidence, including:

- customer feedback
- recordings
- manager statements
- witness statements
- mid and end-of-year performance reviews and feedback

**Your showcase is not your portfolio.** It is a selection of the best work created by you throughout your apprenticeship to 'showcase' your understanding of the requirements within the apprenticeship standard. The IEA will review your showcase evidence, and interview you to delve deeper into the learning experience and to ensure rigor, competence, and independence. They will make a judgment against the marking criteria, however, will be unable to provide you with a preliminary grade due to our full marking and moderation process.

## 2. Practical Observation

The practical observation will be conducted in your place of work and will be assessed over a minimum of one hour. This will take place via live stream, however, can be requested as a face-to-face assessment. During the practical observation, wherever possible, situations and evidence should be naturally occurring. The practical observation will be pre-planned and scheduled to when you will be in your normal place of work and will be carried out by the IEA.

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

This can be arranged before the assessment takes place to give you the best opportunity to meet all of the criteria. The IEA will take notes during your observation and review these against the marking criteria and the apprenticeship standard.

## 3. Professional Discussion

The purpose of the professional discussion is to discuss with you any areas the IEA requires clarification on from their assessment of your learner journey and practical observation. This will need to take place in a suitable environment and should last for a maximum of one hour, this will be recorded for accuracy.

Your professional discussion will be conducted against set criteria and will also clarify any questions the IEA has from their assessment of the learner journey and practical observation.

Your discussion will be based on the standard outcomes and designed to draw out evidence against the criteria. You will be required to provide real-life examples of how you have applied knowledge and understanding whilst carrying out your job role. The professional discussion will take place on the same day following the practical observation.

### Re-taking your End-point Assessment

Should you be required to re-take any component of your EPA, in line with the guidance from the ESFA:

*“If a learner is doing a re-take for a Customer Service Practitioner standard and they FAIL they can re-take the assessment. If they then pass at the second attempt, regardless of the amount of work they do, they will only receive a PASS mark”.*

### Guidance for completing your showcase

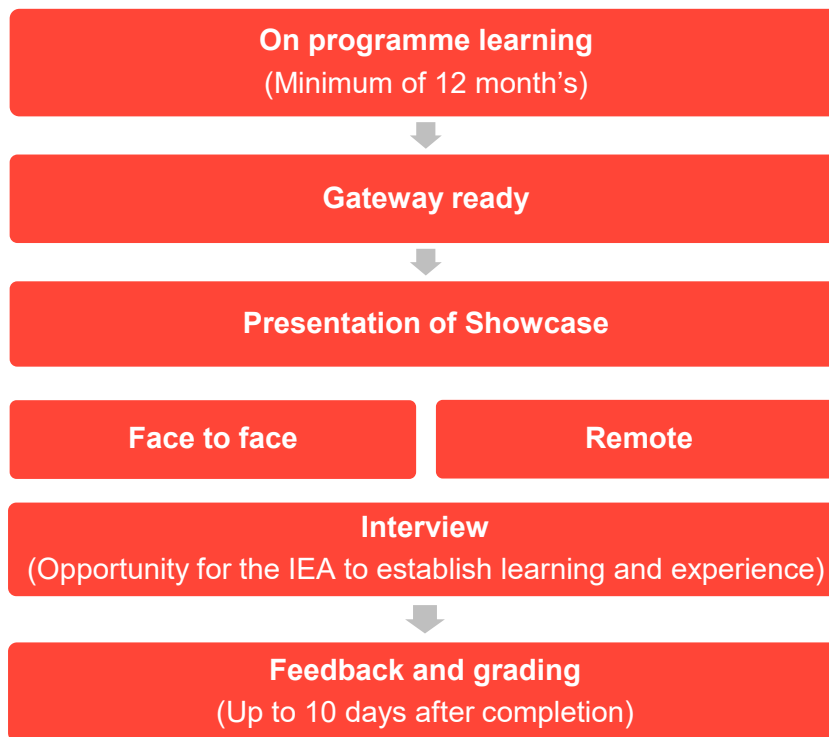
#### Scope

The showcase is a significant display of your competence in the work you have done and the evidence you have collected as part of your Customer Service Practitioner apprenticeship. The purpose of the showcase is to enable you to reflect and present your best work as examples of your development, gained throughout the apprenticeship. You should look to:

- Demonstrate your ability to influence, organise, deal with conflict and challenge, develop self, be open to feedback and work as a team.

- Describe your understanding of the organisation, regulations and legislation, systems and resources and products and service knowledge.

### Timescale



### Supervision and verification arrangements

The IEA knows that the work being looked at is your own work. This is because at the same time as uploading your showcase evidence, you and your employer complete and upload a Declaration of Authenticity form.

### Format of evidence

The face to face or remote presentation\* of your showcase will take place depending on what your employer and you want. Just let us know what is best for you. This is an important part of your apprenticeship; see the weightings and the grades you could get:

| Showcase Weighting | Grades available          |
|--------------------|---------------------------|
| 65%                | Fail, Pass or Distinction |

\* **Presentation** - Your showcase can be presented to VTCT Skills in two ways, either face to face or remotely. You will need to discuss your preferred option with your employer/provider you are showcasing the best of your knowledge, skills, and behaviours. The showcase can be presented face to face, which allows the IEA to delve deeper which allows you to explain further. You can also present your showcase remotely, either by your provider/employer uploading your showcase to epaPRO or through online platforms such as smart room and skype. Presenting your showcase through an online platform will also allow the IEA to delve deeper and allow you to elaborate on your showcase via an interview. Below are some suggested types of evidence for you can include in your showcase.

### What the Independent End-point Assessor will be looking for

- You have taken ownership of your showcase and have presented it using suitable methods. You have used methods that are meaningful to you, and that compliment your working style, your confidence level, and your ability to demonstrate the application of the required knowledge, skills, and behaviours. For example, you lack confidence when communicating verbally, however, enjoy producing engaging written work, therefore to achieve your potential you have used written reports, journals, and reflective accounts to document what you know and what you do
- You have worked independently
- The evidence provided is authentic and is your own work
- You have selected the most appropriate evidence from your on-programme portfolio to demonstrate the required skills and knowledge, as outlined in Annex A of the Customer Service Practitioner Level 2 Assessment Plan.
- The evidence provided is authentic (the IEA will check that the Declaration of Authenticity form has been completed by you and your employer and uploaded to epaPRO).

### Suggested types of evidence

| Evidence type  | Points to consider   |
|--|--|
| <b>Presentation</b><br>- <b>Face to face or remote</b> | <ul style="list-style-type: none"> <li>• Preparation and practice</li> <li>• Location/environment</li> <li>• Equipment, technology and connectivity</li> <li>• Information to be communicated</li> <li>• Introduction</li> <li>• Expected outcome</li> <li>• Visual aids</li> <li>• Body language and tone of voice</li> </ul> |
| <b>Report</b><br><i>Written or verbal</i>              | <ul style="list-style-type: none"> <li>• Account of situations/events you have been involved in</li> <li>• Relevant, concise and factual</li> <li>• Headings and topics</li> <li>• Tables, graphs and charts</li> </ul>  |
| <b>Storyboard</b><br><i>Written or digital</i>         | <ul style="list-style-type: none"> <li>• Message to be conveyed</li> <li>• Sequence of events; flow of activities</li> </ul>   |
| <b>Journal</b><br><i>Written or digital</i>            | <ul style="list-style-type: none"> <li>• Methods for recording learning events and activities i.e. video diaries, social media, blogs or paper based</li> <li>• Methods for recording feedback from others i.e. email, statements, recordings</li> <li>• Reflection, analysis and development</li> </ul>                       |
| <b>Reflective account</b><br><i>Written or verbal</i>  | <ul style="list-style-type: none"> <li>• How theory has been put into practice</li> <li>• Who, what, where, when, why and how?</li> <li>• Specific, work related examples</li> </ul>   |
| <b>Witness statement</b><br><i>Written or verbal</i>   | <ul style="list-style-type: none"> <li>• Completed by person who is familiar with you</li> <li>• Who, what, where, when, why and how?</li> <li>• Specific, work related examples</li> </ul>  |
| <b>Manager statement</b><br><i>Written or verbal</i>   | <ul style="list-style-type: none"> <li>• Who, what, where, when, why and how?</li> <li>• Specific, work related examples</li> </ul>  |
| <b>Video/audio recordings</b>                          | <ul style="list-style-type: none"> <li>• Equipment and technology</li> <li>• Quality of recording</li> <li>• Environment (background noise, GDPR)</li> </ul>   |
| <b>Customer feedback</b><br><i>Written or verbal</i>   | <ul style="list-style-type: none"> <li>• Methods for recording feedback i.e. email, recording, statements, surveys, questionnaires</li> </ul>  |

|   |   |
|---|---|
| <b>Performance reviews</b><br><b>(Mid and end)</b><br><b><i>Written or verbal</i></b> | <ul style="list-style-type: none"> <li>• Methods of performance review i.e. self-evaluation, 360-degree feedback, behavioural checklist, ratings scale, one to one recording/documentation</li> </ul> |
| <b>Work product</b><br><b><i>Written or digital</i></b>                               | <ul style="list-style-type: none"> <li>• Email; screen shots; documents; reports; projects; diaries; journals</li> </ul>  |

*\*\* NB. Assessor-led evidence (assessments that are planned and carried out by your assessor) will not be accepted for the showcase component of the Customer Service Practitioner Standard. This includes and is not limited to professional discussions, question and answer sessions, witness statements, observations\*\**

### Choosing your evidence

The amount of evidence you should submit should be kept to a minimum, criteria linked to the showcase component only needs to be covered once. We understand that some larger pieces of evidence may cover the same criteria as another piece of evidence and this is unavoidable.

When choosing evidence, ask yourself the following questions:

- Is it relevant?
- Is it the most appropriate (best) piece of evidence to cover specific criteria?
- Does it sufficiently demonstrate the required skills, knowledge, and behaviours gained over your 12 months on programme learning?

Your employer/provider should then ask

- Are all criteria covered?
- Are there multiple pieces of evidence that demonstrate the same criteria, un-necessarily?
- Has the most appropriate evidence available been used to try and achieve the highest grade?
- Is the evidence submitted authentic and is your own work?

Good luck with your Apprenticeship, we look forward to meeting you.

Please feel free to view our website for further information

<https://www.vtctskills.org.uk/end-point-assessment/>

**Appendix 4**
**Declaration of Authenticity**

|                                |                               |
|--------------------------------|-------------------------------|
| <b>Apprenticeship Standard</b> | Customer Service Practitioner |
| <b>Component</b>               | Showcase                      |

I confirm that the work/evidence uploaded is my own work and has been personally created by me and demonstrates my knowledge, skills and competence.

I understand that the grade awarded may be invalidated, if it is found work/evidence that does not belong to me has been uploaded.

All work/evidence uploaded towards this assessment is current.

|                             |  |
|-----------------------------|--|
| <b>Apprentice name</b>      |  |
| <b>Apprentice signature</b> |  |
| <b>Date</b>                 |  |

I confirm that the Showcase work/evidence is that of the above member of staff

|                           |  |
|---------------------------|--|
| <b>Employer name</b>      |  |
| <b>Employer signature</b> |  |
| <b>Date</b>               |  |

**\*\*\* The Apprentice will complete and upload this form at the same time as uploading the Showcase to epaPRO via their login\*\*\***