



End-Point Assessment

Customer Service Practitioner Level 2 (V1.1)

Support Pack

nqual.

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INTRODUCTION

This document sets out the requirements, advice, and guidance for the End Point Assessment (EPA) of the Customer Service Practitioner Level 2 apprenticeship standard. This document is designed for apprentices, employers and training providers involved within the End-Point Assessment of an apprentice studying Customer Service Practitioner Level 2.

An apprentice for Customer Service Practitioner Level 2 should typically take up to 12 months on programme, although this may vary depending on previous experience.

This support pack is divided into sections covering all the relevant aspects of EPA for the Customer Service Practitioner Level 2.

Should you require any further information other than the guidance in this document, please do not hesitate to contact admin@nqual.co.uk

Within this guide you will find references to End-Point Assessments. This information has been outlined in the Institute for Apprenticeships and Technical Education, Customer Service Practitioner Level 2 Assessment Plan. For reference, you can find this document.

[Customer Service Practitioner L2 EPA Plan](https://www.instituteforapprenticeships.org/Customer-Service-Practitioner-L2-EPA-Plan)
(www.instituteforapprenticeships.org)



EPA TIMESCALE

Register with NQual

Training Providers should register apprentices For EPA with NQual a minimum of 90 days before assessment. Providers will pay a registration fee of £30.

This is when the employer, apprentice and training provider confirm that the apprentice is ready for End-Point Assessment. All evidence should be uploaded to NQual a minimum of 10 working days prior to EPA.

Gateway

EPA Booking

The training provider should complete the booking section on the Gateway Form or training providers can arrange the booking via ACE360. NQual will confirm booking within 48 hours.

NQual will send an invoice for the remaining fee once EPA is approved.

EPA Approved

Assessment

The apprentice will complete a Showcase, Practical Observation and a Professional Discussion.

Results will be communicated within 10 working days of final assessment. If the apprentice passes, NQual will send details to the apprentice and training provider containing an EPA results document. If the apprentice fails, NQual will send details to the learner and training provider outlining feedback and next stages.

Results

GATEWAY

This section outlines the requirements an apprentice must have met in order to complete their End-Point Assessment.

Once the employer is fully satisfied that the apprentice has the knowledge, skills and behaviours set out within this standard, the employer can formally confirm that the apprentice is ready for EPA via Gateway.

Gateway requirements for Customer Service Practitioner Level 2 outline the apprentice must have:

- **Evidence of achieving relevant maths and English qualifications if required by funding regulations or the employer**
- **Apprentice Showcase**

The Gateway form must be sent to NQual a minimum of 10 working days before End-Point Assessment is carried out, along with the evidence listed above.

All EPA activity will take place no later than 3 months from Gateway.

You can access the NQual Gateway form by emailing: admin@nqual.co.uk

PREPARE FOR THE APPRENTICE SHOWCASE

The Apprentice Showcase is compiled after 12 months of on-programme learning. The Apprentice Showcase enables apprentices to reflect and present examples of their development over the whole on-programme period. The apprentice will select appropriate evidence from the on-programme portfolio to demonstrate the minimum requirements of the standard at the final stage of the programme as an 'Apprentice Showcase'.

The evidence contained in the Apprentice Showcase will be assessed against the following areas:

- 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

COMPONENTS OF END-POINT ASSESSMENT

The Customer Service Practitioner Level 2 apprenticeship standard includes 3 components, an Apprentice Showcase, Practical Observation with Q&A and Professional Discussion.

Apprentice Showcase

The Apprentice Showcase is compiled after 12 months of on-programme learning.

The Apprentice Showcase enables apprentices to reflect and present examples of their development over the whole on-programme period. The apprentice will select appropriate evidence from the on-programme portfolio to demonstrate the minimum requirements of the standard at the final stage of the programme as an 'Apprentice Showcase'.

The Apprentice Showcase will be reviewed and assessed by the independent assessor. 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 EPA will be assessed remotely unless otherwise stated.

The Apprentice Showcase will be assessed and will be submitted as a Portfolio Submission with a maximum of 20 pieces of evidence. It is expected that the Portfolio Submission will include elements such as work-based evidence, including customer feedback, recordings, manager statements, and witness statements. It will also include evidence from others, such as mid-and-end of year performance reviews, and feedback.

The apprentice will then be given the opportunity to discuss further their experiences, within a 20-30 minute interview with an Independent Assessor.

Practical Observation

The observation can be delivered face-to-face, or remotely.

The observation will take place in the apprentice's real working environment and could cover different situations such as handling general enquiries, dealing with customer complaints or needs for further information. However, the minimum areas to be covered include presentation, equality, interpersonal skills, communication and personal organisation.

The observation will last 60 minutes.

Professional Discussion

The Professional Discussion will be a structured discussion between the apprentice and assessor following the observation to establish the apprentice's understanding and application of knowledge, skills, and behaviours. The discussion will take place in an environment that is suitable for the apprentice and will last a maximum of 60 minutes.

END-POINT ASSESSMENT METHODS TABLE

The below highlights criteria that will be covered in each assessment component. Please review these details as it will provide guidance on what will be covered in each assessment component.

| Learning Outcomes | What is Required | Observation in Practice | Professional Discussion | Apprentice Showcase |
|-------------------|---|-------------------------|-------------------------|---------------------|
| Knowledge | | | | |
| K1 | Understand who customers are | | ✓ | |
| K2 | Understand the difference between internal and external customers | | ✓ | |
| K3 | Understand the different needs and priorities of your customers and the best way to manage their expectations recognising and knowing how to adapt style to be highly effective | | ✓ | |
| K4 | Know the purpose of the business and what brand promise means | | | ✓ |
| K5 | Know your organisation's core values and how they link to the service culture | | | ✓ |
| K6 | Know the internal policies and procedures including any complaints processes and digital media policies that are relevant to you and your organisation | | | ✓ |
| K7 | Know the appropriate legislation and regulatory requirements that affect your business | | | ✓ |
| K8 | Know your responsibility in relation to this and how to apply it when delivering service | | | ✓ |
| K9 | Know how to use systems equipment and technology to meet the needs of your customers | | | ✓ |
| K10 | Understand types of measurement and evaluation tools available to monitor customer service levels | | | ✓ |
| K11 | Understand your role and responsibility within your organisation and the impact of your actions on others | | ✓ | |

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| K12 | Know the targets and goals you need to deliver against | | ✓ | |
| K13 | Understand how establishing the Facts enables you to create a customer Focused experience and appropriate response | | ✓ | |
| K14 | Understand how to build trust with a customer and why this is important | | ✓ | |
| K15 | Understand the products or services that are available from your organisation and keep up to date | | | ✓ |
| Skills | | | | |
| S1 | Use a range of questioning skills, including listening, and responding in a way that builds rapport determines customer needs and expectations and achieves positive engagement and delivery | ✓ | | |
| S2 | Use appropriate verbal and non-verbal communication skills along with summarising language during face-to-face communications | ✓ | | |
| S3 | Use appropriate communication skills along with reinforcement techniques to confirm understanding during non-facing customer interactions | ✓ | | |
| S4 | Use an appropriate tone of voice in all communications including written and digital that reflect the organisation's brand | ✓ | | |
| S5 | Provide clear explanations and offer options to help customers make choices that are mutually beneficial to both the customer and your organisation | | | ✓ |
| S6 | Be able to organise yourself prioritise your own workload/ activity and work to meet deadlines | | | ✓ |
| S7 | Demonstrate patience and calmness | | | ✓ |
| S8 | Show you understand the customer's point of view | | | ✓ |
| S9 | Use appropriate signposting or resolution to meet your customer's needs and manage expectations | | | ✓ |

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| S10 | Maintain informative communication during service recovery | | | ✓ |
| Behaviours | | | | |
| B1 | Take ownership For keeping your service knowledge and skills up to date | | | ✓ |
| B2 | Consider personal goals and propose development that would help achieve them | | | ✓ |
| B3 | Act on and seek Feedback From others to develop or maintain personal service skills and knowledge | | | ✓ |
| B4 | Frequently and consistently communicate and work with others in the interest of helping customers efficiently | | | ✓ |
| B5 | Share personal learning and case studies with others presenting recommendations and improvement to support good practice | | | ✓ |
| B6 | Treat customers as individuals to provide a personalised customer service experience | ✓ | | |
| B7 | Uphold the organisations core values and service culture through your actions | ✓ | | |
| B8 | Demonstrate professional pride in the job through appropriate dress and positive and confident language | ✓ | | |
| B9 | Use communication behaviours that establish clearly what each customer requires and manage their expectations | ✓ | | |
| B10 | Take ownership From the First contact and then take responsibility For Fulfilling your promise | ✓ | | |

GRADING & CRITERIA

Assessments will result in the apprentice achieving a Fail, Pass, or Distinction. This decision is dependent on whether they have met the standard and its End-Point Assessment criteria.

In order to achieve a Pass grade, the apprentice must gain a minimum of a Pass in all components of the End-Point Assessment.

Grading results will be communicated to the apprentice within 10 working days of completion of the final component.

Assessment Breakdown

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| Pass | All Pass Criteria Achieved |
| Distinction | All Pass Criteria Achieved Plus: Apprentice Showcase - 7 out of 10 Observation - 4 out of 5 Professional Discussion - 3 out of 4 |

The Pass and Distinction descriptors can be found in the tables below separated into Apprentice Showcase, Observation and Q&A and Professional Discussion.

Grading Descriptors for Apprentice Showcase

| Module | Pass Descriptors | Distinction Descriptors |
|-------------------------------------|---|---|
| Understanding the Organisation | <p>State the aims of the organisation in relation to its sector.</p> <p>State what is meant by the organisation's 'brand promise'.</p> <p>Explain how the organisation's core values relate to its service culture.</p> <p>State the purpose of different organisational policies and procedures that affect their customer service role.</p> <p>Describe the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment.</p> | <p>Explain how the organisational policies and procedures impact on the delivery of customer service.</p> |
| Meeting Regulations and Legislation | <p>Explain how the relevant legislation and regulations affect the organisation's customer service provision.</p> <p>State their responsibilities for keeping information confidential in the organisation.</p> <p>State the responsibilities of employees and employers under the Health and Safety at Work Act.</p> | <p>Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations.</p> <p>Explain how a code of practice or ethical standards affects customer service.</p> |

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| Systems and Resources | <p>Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively.</p> <p>Describe the measures and evaluation tools used in the organisation to monitor customer service levels.</p> | |
| Product and Service Knowledge | <p>Explain the difference between the features and benefits of products and/or services in relation to the organisation.</p> <p>Describe how to maintain their knowledge of the organisation's products and/or services.</p> | <p>Explain why it is important to update their knowledge on the organisation's products and/or services.</p> |
| Influencing Skills | <p>Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation.</p> <p>Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs.</p> <p>Handle customer objections in a positive and professional manner.</p> | <p>Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached.</p> |
| Personal Organisation | <p>Prioritise and plan the completion of tasks according to agreed deadlines.</p> <p>Use appropriate tools and techniques to monitor the progress of tasks completion</p> | <p>Respond in a professional manner to challenges and changes and adjust priorities accordingly.</p> |
| Dealing With Customer Conflict and Challenge | <p>Maintain calm and patience at all times when dealing with challenging customer situations.</p> <p>Demonstrate sensitivity to, and interest in, the customers' concerns.</p> <p>Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers.</p> <p>Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures.</p> <p>Keep customers informed of progress while resolving issues.</p> <p>Maintain accurate record of customer issues and progress to resolution.</p> | <p>Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.</p> <p>Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.</p> |
| Developing Self | <p>Conduct a self-assessment to identify their strengths and weaknesses in relation to the job role.</p> <p>Produce a personal development plan to support the achievement of their agreed learning and development goals</p> | <p>Review the effectiveness of their personal development plan and update it accordingly.</p> |

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| Being Open to Feedback | <p>Seek constructive feedback about their customer service skills and knowledge from others.</p> <p>Use feedback from others to develop their customer service skills and knowledge.</p> | |
| Team Working | <p>Work with others in a positive and productive manner.</p> <p>Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently.</p> <p>Share personal learning and information with others to support good customer service practice</p> | <p>Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers.</p> <p>Present reasoned ideas for improving customer service practice to the appropriate colleagues.</p> |

Grading Descriptors for Observation and Q&A

| Module | Pass Descriptors | Distinction Descriptors |
|----------------------|---|---|
| Interpersonal Skills | <p>Demonstrate willingness and ability to engage with customers in a positive manner using relevant interpersonal skills.</p> <p>Work with customers to build a rapport, recognising and where possible meeting their needs and expectations.</p> <p>Show willingness to work with others and share ideas where appropriate.</p> | <p>Demonstrate ability to adapt interpersonal skills when working on meeting the needs and expectations of different customers, showing knowledge of the application of the Equality Act when communicating (verbally or non-verbally).</p> <p>Demonstrate ability to balance the needs and expectations of the customer with that of the organisation.</p> <p>Pro-actively work with others to ensure efficient customer service delivery.</p> |
| Communication | <p>Face to Face'. Demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills.</p> <p>Adapt tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations.</p> <p>Demonstrate ability to recognise when to summarise and the techniques to use.</p> <p>Non- Facing'. Demonstrate ability to make initial customer contact and make use of appropriate communication skills.</p> <p>Adapts tone and behaviour when necessary, recognising and confirming understanding of needs and expectations.</p> | <p>In all roles, Demonstrate ability to adapt communication - tone, behaviour and language - to different customers and their interactions, showing clear knowledge of the application of the Equality Act in all customer handling.</p> <p>In all roles, Demonstrate ability to flex to various customer personalities, while remaining calm and in control where necessary. They will also demonstrate they know the organisational procedures to be followed in all communication and the importance to the brand/organisation of this requirement</p> |

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| | Demonstrates ability to recognise and use reinforcement techniques during customer interactions. | |
| Equality: Treating All Customers as Individuals | <p>Recognise and respond to individual needs to provide a personalised customer service experience.</p> <p>Behave in a way that upholds the core values and service culture of the organisation.</p> | |
| Presentation: Dress Code, Professional Language | <p>Present a professional image in line with the organisational dress code and code of conduct.</p> <p>OR</p> <p>Demonstrate a positive attitude and welcoming approach consistently when dealing with customers.</p> <p>Maintain professional and positive language consistently in customer interactions.</p> | |
| Right First Time | <p>Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging.</p> <p>They will show an ability to establish needs and expectations, working towards meeting them where possible, explaining when necessary when they cannot be met.</p> <p>Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures.</p> <p>Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers.</p> <p>Take ownership from beginning to end, building and maintaining a relationship with the customer.</p> <p>Recognise the importance of good customer service to the customer and in turn the organisation, making contact as promised, referring to others as necessary with all required detail, following up to ensure conclusion.</p> | |

Grading Descriptors for Professional Discussion

| Module | Pass Descriptors | Distinction Descriptors |
|--------------------------------|--|--|
| Knowing Your Customers | <p>Explain the difference between internal and external customers in the context of their organisation.</p> <p>Describe the specific needs of different customers, including those protected under current Equality law.</p> <p>Explain when and how to adapt their service approach to meet the needs and expectations of customers.</p> <p>Explain when and how to adapt service approach to meet the needs and expectations of customers.</p> | <p>Explain the importance of building good customer relationships to the organisation.</p> <p>Explain the difference in the way internal and external customer relationships are managed.</p> <p>Explain the importance of balancing the needs of both the organisation and its customers.</p> |
| Your Role and Responsibilities | <p>Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation.</p> <p>Describe how to achieve their agreed targets and goals.</p> | |
| Customer Experience | <p>Explain how an understanding of the facts can be used to create a customer focused experience.</p> <p>Explain how to build trust with customers and the importance of doing so.</p> | <p>Explain how to respond to customer needs and requirements positively.</p> |

Re-sit / Re-take

If an apprentice Fails one or more component, they will be offered the opportunity to re-sit / re-take the component(s). It is then up to the apprentice's employer how many attempts an apprentice is given.

The timescale for a re-sit typically takes 3 months and a re-take 3 months (dependent on how much re-training is required). All assessment methods must be taken within a 6-month period, otherwise the entire EPA will need to be resat / retaken.

Where any assessment method must be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of Pass. Re-sits and re-takes are not offered to an apprentice wishing to move from Pass to a higher grade.

MOCK PRACTICAL OBSERVATION

It is the responsibility of the employer and training provider to complete a Mock Practical Observation with the apprentice and to ensure they are ready for their End-Point Assessment.

A Mock Observation should take 60 minutes.

Mock assessment materials will be given to the training providers when registering learners with NQual.

MOCK PROFESSIONAL DISCUSSION

It is the responsibility of the employer and training provider to complete Mock Professional Discussions with the apprentice and the responsibility of the apprentice to ensure they have practised answering questions for their End-Point Assessment.

Professional Discussion materials will be given to the training providers when registering learners with NQual.

A Mock Professional Discussion should take a maximum of 60 minutes.



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