



## End-Point Assessment

Customer Service Specialist Level 3 (V1.2)

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 Specialist Level 3 Apprenticeship standard. This document is designed for apprentices, employers and training providers involved within the End-Point Assessment of an apprentice studying Customer Service Specialist Level 3.

An apprentice for Customer Service Specialist Level 3 should typically take up to 15 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 Specialist Level 3.

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

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

[Customer Service Specialist L3 EPA Plan](https://www.instituteforapprenticeships.org/Customer-Service-Specialist-L3-EPA-Plan)  
([instituteforapprenticeships.org](https://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 Practical Observation with Q&As, Work-Based Project Supported by an Interview and a Professional Discussion Supported by Portfolio Evidence.

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 Specialist Level 3 outline the apprentice must have:

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

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](mailto:admin@nqual.co.uk)

## PORTFOLIO OF EVIDENCE

As part of the apprenticeship, apprentices are required to prepare a Portfolio of Evidence which will be developed on programme to demonstrate their practice in achieving the knowledge, skills and behaviours (KSBs) associated with the Professional Discussion. The Portfolio of Evidence should typically contain between 10-15 pieces of evidence, providing examples of how the apprentice has met the relevant KSBs and applied them to their working practice. Please note, the Portfolio of Evidence is not directly assessed.

The on-programme portfolio that will inform the showcase might include observations (key component of your portfolio), witness statements, Q&A, professional discussions, 360-degree feedback, product evidence, progress reviews and development plans (\*please note that this is not an exhaustive list. Reflective accounts and self-evaluation cannot be included as evidence for the Portfolio of Evidence).

## PORTFOLIO SUBMISSION

An apprentice's portfolio should be submitted via ACE360 no later than 14 days prior to End-Point Assessment.

The employer will be expected to sign a declaration to confirm that the portfolio is authentic, and the apprentice's own work. This can be found on the Customer Service Specialist Level 3 gateway form.

## COMPONENTS OF END-POINT ASSESSMENT

The Customer Service Specialist apprenticeship standard requires three distinct assessment methods, an Observation with Q&A, Work-Based Project Supported by an Interview and Professional Discussion Supported by a Portfolio of Evidence.

### Practical Observation with Q&As

The Practical Observation is covered in one session, lasting 60 minutes. During this time, the apprentice will be observed in their usual workplace by their Independent End-Point Assessor undertaking a range of activities, the apprentice should be able to demonstrate the relevant KSB's. The Practical Observation must reflect the apprentices real working conditions, be carried out on a one-to-one basis and allow the apprentice to demonstrate all aspects of the standard being assessed. The apprentice will be given 2 weeks' notice of the Practical Observation.

### Work-Based Project Supported by an Interview

For this assessment method apprentices must submit a written report, on a project that they had carried out, to NQual two weeks prior to the interview date. This

date will be agreed when the apprentice passes through the Gateway process. The written report must be 2500 words, the subject of the project should be agreed with NQual at gateway. The Work-Based Project should always take place before the interview to support the Work-Based Project. The interview will last for 60 minutes and will take place either face to face or remotely. The interview will consist of competency-based questions. The apprentice will be asked 10 questions.

### Professional Discussion Supported by Portfolio Evidence

This assessment method will last for 60 minutes. The Professional Discussion will be supported by the Portfolio of Evidence submitted by the apprentice. There should be 10-15 pieces of evidence submitted to apply the Professional Discussion, this can include witness statements, customer feedback or manager feedback. This should be submitted to NQual two weeks prior to the Professional Discussion date. The Professional Discussion can take place either face-to-face or remotely.

## 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 with Q&A	Work-Based Project Supported by Interview	Professional Discussion Supported by Portfolio Evidence
Knowledge				
K1	Understand your organisation's current business strategy in relation to customers and make recommendation for its future		✓	
K2	Understand the impact your service provision has on the wider organisation and the value it adds			✓
K3	Understand what conscious improvement means in a service environment and how your recommendations for change impact your organisation		✓	
K4	Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions		✓	
K5	Understand a range of leadership styles and apply them successfully in a customer service environment			✓
K6	Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience		✓	
K7	Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention			✓
K8	Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation		✓	
K9	Understand commercial factors and authority limits for delivering the required customer experience			✓

K10	Know your internal and external customers and how their behaviour may require different approaches from you			✓
K11	How to analyse, use and present a range of information to provide customer insight	✓		
K12	Understand what drives loyalty, retention and satisfaction and how they impact on their organisation			✓
K13	Understand different consumer types and the role of emotions in bring about a successful outcome	✓		
K14	Understand how customer expectations can differ between cultures ages and social profiles	✓		
K15	Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers	✓		
K16	Understand your business environment and culture and the position of customer service within it		✓	
K17	Understand you organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong		✓	
K18	Understand how to Find and use industry best practice to enhance your own knowledge			✓
Skills				
S1	Demonstrate a continuous improvement and Future Focused approach to customer service delivery including decision making and providing recommendations and advice		✓	
S2	Resolve complex issues by being able to choose from and successfully apply a wide range of approaches			✓
S3	Find solutions that meet your organisation's needs as well as the customer requirements	✓		



S4	Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes	✓		
S5	Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy	✓		
S6	Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps	✓		
S7	Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction		✓	
S9	Demonstrate a cost-conscious mind-set when meeting customer and the business needs			✓
S10	Identify where highs and lows of the customer journey produce a range of emotions in the consumer journey to produce a range of emotions in the customer	✓		
S11	Use written and verbal communication to simply and provide complex information in a way that supports positive customer outcome in the relevant format	✓		
S12	Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implications and the facts and act upon it		✓	
S13	Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service		✓	
S14	Maintain a positive relationship even when you are unable to deliver the customer's expected outcome	✓		
S15	When managing referrals or escalations to take into account historical interactions and challenges to determine next steps	✓		

S16	Analyse the end-to-end service experience, seeking input from others where required supporting development of solutions		✓	
S17	Make recommendations based on your findings to enable improvement		✓	
S18	Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice		✓	
Behaviours				
B1	Proactively keep your service, industry and best practice knowledge and skills up to date			✓
B2	Consider personal goals related to service and take action towards achieving them			✓
B3	Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation	✓		
B4	Exercises proactivity and creativity when identifying solutions to customer and organisational issues	✓		
B5	Make realistic promises and deliver on them			✓
B6	Work effectively and collaboratively with colleagues at all levels to achieve results	✓		
B7	Recognise colleagues as internal customers	✓		
B8	Share knowledge and experience with others to support colleague development			✓
B9	Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer	✓		
B10	Be adaptable and Flexible to your customer needs whilst continuing to work within the agreed customer service environment	✓		

B11	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction	✓		
B12	Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand	✓		

## 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 Passing 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 Grading Breakdown

An apprentice must achieve a minimum of a Pass in all components to achieve a Pass overall. To achieve a Distinction, the apprentice must achieve all Pass and all Distinction criteria. The final grade will be decided on the following combinations.

Assessment Methods 1: Practical Observation with Q&As	Assessment Methods 2: Work-Based Project Supported by an Interview	Assessment Methods 3: Professional Discussion Supported by Portfolio Evidence	Overall Grade
Fail	Any Grade	Any Grade	Fail
Any Grade	Fail	Any Grade	Fail
Any Grade	Any Grade	Fail	Fail
Pass	Pass	Pass	Pass
Pass	Pass	Distinction	Pass
Pass	Distinction	Pass	Pass
Distinction	Pass	Pass	Pass
Distinction	Distinction	Distinction	Distinction

Pass and Distinction descriptors can be found in the tables below and are separated into Practical Observation, Work-Based Project and Professional Discussion.

### Grading Descriptors for Practical Observation with Q&As

Pass Descriptors	Distinction Descriptors
<p>Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.</p> <p>An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.</p> <p>Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.</p> <p>An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.</p> <p>Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.</p> <p>Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.</p> <p>Recognises when customer emotions have been effected by the level of service offered.</p> <p>Demonstrates how they adapt their communication style clearly and concisely communicate complex information to customers to supportive positive outcomes.</p> <p>Evidences when they have maintained a positive relationship even when they are unable to deliver the customers expected outcome.</p> <p>Evidence 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.</p> <p>Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.</p> <p>Shows proactivity and creativity when identifying solutions to customer and organisational issues.</p> <p>Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures.</p> <p>Demonstrates achievement of results through effective teamwork and collaboration with colleagues at all levels.</p> <p>Shows adaptability of own skills when working with internal customers.</p>	<p>Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.</p> <p>Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.</p>



Demonstrates the ability 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.

## Grading Descriptors for Work-Based Project Supported by an Interview

Pass Descriptors	Distinction Descriptors
<p>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.</p> <p>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.</p> <p>Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.</p> <p>An understanding of the underpinning business processes that support them on bringing about the best outcome for customers and their organisation.</p> <p>Provides evidence to show how they identify how this information can be analysed, used and presented</p> <p>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.</p> <p>Ability to discuss the internal and external factors influencing their business environment and culture.</p> <p>Evidence knowledge of the departmental roles/ functions within their organisational structure and their influence in customer service delivery.</p> <p>Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.</p> <p>Ability to identify potential causes of service failure and the consequences of these.</p>	<p>Evidence to support their research and analysis of customer service standards and mission statements of other organisations, in comparisons, in comparison to their own organisations, to inform their recommendations.</p> <p>Ability to consider the possible impact on their organisation of not considering the future in decision-making.</p> <p>Demonstrates how knowing their customer and their needs has a direct impact on:</p> <ol style="list-style-type: none"> <li>their working practices</li> <li>organisational policy/ procedures</li> </ol> <p>Ability to demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation.</p> <p>Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s).</p> <p>Provides evidence to show when they analyse the risks and opportunities to implementing change.</p> <p>Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommend alternative methods likely to improve results, stating reasons for choice.</p> <p>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.</p>

<p>Evidences when they made decisions and recommendations to improve their own customer service delivery.</p> <p>Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.</p> <p>Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements.</p> <p>Ability to gather and analyse information about the types of customers their organisation has and explain how the service they provide meet their potential needs and expectations.</p> <p>Evidence to show how they use qualitative and quantitative customer experience data that their organisation gathers.</p> <p>Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required.</p> <p>Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.</p>	<p>Demonstrates an ability to identify trends/ recurring issues and analyse why they occurred and record possible ways of addressing them to ensure that they do not reoccur.</p>
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## Grading Descriptors for Professional Discussion Supported by Portfolio Evidence

Pass Descriptors	Distinction Descriptors
<p>Ability to describe their role in meeting their organisation's standards and its impact upon other departments.</p> <p>Evidence of how they identify the different types of leadership styles that work best in their customer environment.</p> <p>Demonstrates when they have balanced the meeting their customer and their organisation's needs while showing they have considered cost implications.</p> <p>Demonstrate sharing own knowledge and experience with others, to support colleague development.</p> <p>Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.</p> <p>Ability to adhere to their organisation service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.</p>	<p>Evidence when they have assessed the impact of sharing their own knowledge on:</p> <ol style="list-style-type: none"> <li>their development</li> <li>Colleague development</li> </ol> <p>Evidence when they have analysed the importance made to their professional image and its relationship with the organisation's brand.</p> <p>Demonstrates how they evaluate, and review improvements made to their own customer service to ensure a future – focused approach.</p>

<p>Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations.</p> <p>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.</p> <p>Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfactions.</p> <p>Demonstrates Factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.</p> <p>Evidence knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development.</p> <p>Provides evidence to demonstrates 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 industry and best practice.</p>	
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## 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 12-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 OBSERVATION WITH Q&A

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 Practical Observation should take 75 minutes and is likely to include 60 minutes of direct observation, followed by 15 minutes of post observation questioning.

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

## MOCK WORK-BASED PROJECT

It is the responsibility of the employer and training provider to complete a Mock Work-Based Project with the apprentice and the responsibility of the apprentice to ensure they have practiced answering questions for their End-Point Assessment.

A Mock Work-Based Project will last for 60 minutes.

## 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 practiced 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 90 minutes.





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