Level 2 Customer Service Practitioner

EPA-Kit

Delivering the Standard

- Knowing your customers
- Understanding the organisation
- Meeting regulations and legislation
- Systems and resources
- Your role and responsibility
- Customer experience
- Influencing skills
- Personal organisation
- Dealing with customer conflict and challenge
- Developing self
- Being open to feedback
- Team working
- Presentation – dress code, professional language
- 'Right first time'
- Product and service knowledge
- Equality – treating all customers as individuals
- Interpersonal skills
- Communication

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The Customer Service Practitioner Apprenticeship Standard

The following pages contain the customer service practitioner apprenticeship standard and the assessment criteria in a suggested format that is suitable for delivery.

Knowing your customers
What do I need to KNOW
Who are my customers?
Who are the organisation's customers?
Describe the different types of customer?
What is an internal customer?
What is an external customer?
Who are the organisation's internal customers?
Who are the organisation's external customers?
What is the difference between internal and external customers to the organisation?
What is the purpose of customer service?
What are the different needs of your customers?
What are the different priorities of your customers?
Identify the specific needs that customers may have, including those that are protected under current equality law?
What is meant by customers' expectations?
How does the standard of customer service affect the success of your organisation?
When do you adapt your service approach to meet the needs and expectations of your customers?
How you adapt your service approach to meet the needs and expectations of your customers?

Professional Discussion		
The apprentice will	**Assessment Criteria**	**Distinction Criteria**
Understand who customers are	K1.1 Explain the difference between internal and external customers in the context of their organisation	*K1.4 Explain the importance of building good customer relationships to the organisation*
Understand the difference between internal and external customers		*K1.5 Explain the difference in the way internal and external customer relationships are managed*
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	K1.2 Describe the specific needs of different customers, including those protected under current Equality law K1.3 Explain when and how to adapt their service approach to meet the needs and expectations of customers	*K1.6 Explain the importance of balancing the needs of both the organisation and its customers*

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Understanding the organisation

What do I need to KNOW

What is the difference between public and third sector organisations?
What is your organisation business type and purpose?
What does 'brand promise' mean?
What is meant by an organisation's core values?
What are your organisation's core values?
What is meant by service culture?
What is your organisation's service culture?
How does your organisation's core values link to the service culture?
What is the purpose of an organisational policy?
List the organisational policies and procedures that could affect a customer service role?
What should be included in a complaints process/procedure?
What is meant by digital media?
What digital media polices exist in customer service organisations?

Apprentice Showcase

The apprentice will	Assessment Criteria	Distinction Criteria
Know the purpose of the business and what 'brand promise' means	K2.1 State the aims of the organisation in relation to its **sector** K2.2 State what is meant by the organisation's **'brand promise'**	K2.6 *Explain how the organisational policies and procedures impact on the delivery of customer service*
Know your organisation's core values and how they link to the service culture	K2.3 Explain how the organisation's **core values** relate to its service culture	

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Apprentice Showcase		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation	K2.4 State the purpose of different **organisational policies and procedures** that affect their customer service role K2.5 Describe the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment	

Amplification and guidance
Sector   - Public, private or third sector (charity)   **'Brand promise'**   - Is a commitment or promise made between a company and its customers.   **Core values**   - Principles that guide an organisation's internal and external behaviour and conduct.   **Organisational policies and procedures**   - An organisation's policies and procedures that are used internally

Meeting regulations and legislation
What do I need to KNOW
Identify appropriate legislation and regulation and how this effects your organisation
Why is it important to keep information confidential within an organisation
What information needs to be kept and remain confidential within your organisation?
What are the responsibilities of the employee under the Health and Safety at Work etc. Act?
What are the responsibilities of the employer under the Health and Safety at Work etc. Act?

Apprentice Showcase		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
Know the appropriate legislation and regulatory requirements that affect your business	K3.1 Explain how the relevant legislation and regulations affect the organisation's customer service provision	K3.4 *Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations*
Know your responsibility in relation to this and how to apply it when delivering service	K3.2 State their responsibilities for keeping information confidential in the organisation	K3.5 *Explain how a code of practice or ethical standards affects customer service*
	K3.3 State the responsibilities of **employees and employers** under the Health and Safety at Work Act	

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Systems and Resources

What do I need to KNOW
What are the systems, equipment and/or technology your organisation uses to effectively meet customers' needs?
In your role how would you use the systems, equipment and/or technology to support customers' needs?
What are the types of measurement used to monitor customer service level?
What are the types of evaluation tool used to monitor customer service levels?

Apprentice Showcase		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
Know how to use systems, equipment and technology to meet the needs of your customers	K4.1 Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively	*There are no distinction criteria for this component*
Understand types of measurement and evaluation tools available to monitor customer service levels	K4.2 Describe the **measures and evaluation tools** used in the organisation to monitor customer service levels	

Amplification and guidance
Measures and evaluation tools   - Methods or tools used to evaluate, measure and document.

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Your role and responsibility

What do I need to KNOW

What is your job role and responsibilities within that role?
How do your actions impact on others in your organisation?
Identify the targets and goals for your role
How do you achieve your targets and goals?

Professional Discussion

The apprentice will	Assessment Criteria	Distinction Criteria
Understand your role and responsibility within your organisation and the impact of your actions on others	K5.1 Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation	*There are no distinction criteria for this component*
Know the targets and goals you need to deliver against	K5.2 Describe how to achieve their agreed targets and goals	

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Customer Experience
What do I need to KNOW
What is meant by a customer-focused experience?
How do you establish the facts to create a customer-focused experience?
How do you use the facts create an appropriate response?
Why is building customers' trust important?
How would you start to build trust with your customers?

Professional Discussion		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
Understand how establishing the facts enable you to create a customer focused experience and appropriate response	K6.1 Explain how an understanding of the facts can be used to create a customer focused experience	*K6.3 Explain how to respond to customer needs and requirements positively*
Understand how to build trust with a customer and why this is important	K6.2 Explain how to build trust with customers and the importance of doing so	

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Product and service knowledge

What do I need to KNOW
What are your organisations products and/or services?
What is the difference between providing a product and providing a service?
How do you update and maintain your knowledge of your organisations products and/or services?

Apprentice Showcase		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
Understand the products or services that are available from your organisation and keep up-to-date	K7.1 Explain the difference between the **features and benefits** of products and/or services in relation to the organisation	*K7.3 Explain why it is important to update their knowledge on the organisation's products and/or services*
	K7.2 Describe how to maintain their knowledge of the organisation's products and/or services	

Amplification and guidance

• **Features and benefits**
  o Features - are facts about products or services that add credibility and substance to your sales pitch.
  o Benefits - give customers a reason to buy because they explain how the product or service improves a customer's life.

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Interpersonal Skills

What do I need to DO

Demonstrate effective interpersonal skills that achieve positive customer engagement using:
- effective use of open and closed questioning skills relevant to the situation
- effective use of active listening skills when communicating
- effective use of body language when interacting with customers
- working with others and sharing good practice when performing your duties

Recognise customers' needs and expectations

Respond to customers' needs and manage expectations in a professional and timely manner

Build and maintain a rapport with customers

Practical Observation

The apprentice will	Assessment Criteria	Distinction Criteria
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	S8.1 Demonstrate willingness and ability to engage with customers in a positive manner using relevant interpersonal skills	S8.4 *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)*
	S8.2 Work with customers to build a rapport, recognising and where possible meeting their needs and expectations	S8.5 *Demonstrate ability to balance the needs and expectations of the customer with that of the organisation*
	S8.3 Show willingness to work with others and share ideas where appropriate	S8.6 *Pro-actively work with others to ensure efficient customer service delivery*

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Communication

What do I need to DO
Use appropriate methods of verbal and non-verbal communication skills relevant to your work environment
Use appropriate body language to maintain or enhance the customer experience
Adapt the tone and/or behaviour to maintain or enhance the customer experience as appropriate
Confirm yours, and the customer's, understanding of the customer's needs and expectations
Use summarising language and/or reinforcement techniques during customer interaction to confirm understanding
Use correct, appropriate and clear communication skills, e.g. written and verbal that reflect your organisation's brand
Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand

Practical Observation		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
(Depending on your job role and work environment) Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions	**Face to face:** S9.1 Demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills S9.2 Adapt tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations S9.3 Demonstrate ability to recognise when to summarise and the techniques to use	***Both face to face and non-facing:*** *S9.7 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* *S9.8 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*

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Practical Observation		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
	Non- facing: S9.4 Demonstrate ability to make initial customer contact and make use of appropriate communication skills S9.5 Adapts tone and behaviour when necessary, recognising and confirming understanding of needs and expectations S9.6 Demonstrates ability to recognise and use **reinforcement techniques** during customer interactions	*and the importance to the brand/organisation of this requirement.*

Amplification and guidance

• **Reinforcement techniques**
    o Something used to clear up customer confusion and help them understand
• **customer personalities**
    o e.g. an angry or an easy-going, relaxed customer.

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Influencing skills

What do I need to DO
Identify customers' needs
Offer product and/or service options to customers in a logical and reasoned manner
Clearly explain how the options offered meet a customer's needs
Handle customer objections in a positive and professional manner

Apprentice showcase		
The apprentice will	**Assessment Criteria**	**Distinction Criteria**
Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation	S10.1 Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation S10.2 Communicate to customers in a **clear and coherent manner** how the products and/or services offered meet their needs S10.3 Handle customer objections in a positive and professional manner	*S10.4 Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached*
Amplification and guidance		
• **Clear and coherent manner** o i.e. without the use of jargon		

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Personal organisation

What do I need to DO
Agree goals and deadlines for completing tasks with an appropriate person
Prioritise and plan the completion of tasks to meet delivery deadlines
Use tools and techniques to monitor progress of tasks
Monitor and adjust priorities as required
Meet agreed deadlines

Apprentice showcase		
The apprentice will	**Assessment Criteria**	**Distinction Criteria**
Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines	S11.1 Prioritise and plan the completion of tasks according to agreed deadlines S11.2 Use appropriate tools and techniques to monitor the progress of tasks completion	*S11.3 Respond in a professional manner to challenges and changes and adjust priorities accordingly*

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Dealing with customer conflict and challenge

What do I need to DO
Show patience, calmness and empathy when dealing with challenging customer situations
Use active listening skills when communicating with customers
Use appropriate questioning skills
Show understanding of the customer's view point
Explain the next steps and/or the customer's options in a logical manner
Provide clear signposting or resolutions to meet customers' needs and manage customers' expectations
Deal with the customer conflict or challenge presented in line with organisational and/or policies procedure
Resolve customer conflict or challenge presented in line with organisational policies and/or procedures
Keep customers informed of progress while resolving issues
Maintain an accurate record of customers' issues and progress to resolution

Apprentice Showcase		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
Demonstrate patience and calmness	S12.1 Maintain calm and patience at all times when dealing with challenging customer situations	*S12.7 Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.*
Show you understand the customer's point of view	S12.2 Demonstrate sensitivity to, and interest in, the customers' concerns	
Use appropriate signposting or resolution to meet your customers' needs and manage expectations	S12.3 Communicate in a **clear and coherent manner** the next steps and/or options to meet the needs and expectations of customers	

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Apprentice Showcase		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
	S12.4 Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures	
Maintain informative communication during service recovery	S12.5 Keep customers informed of progress while resolving issues	
	S12.6 Maintain accurate record of customer issues and progress to resolution	

Amplification and guidance
• **Clear and coherent manner**   o I.e. without the use of jargon

Developing Self

What do I need to SHOW
Identify own strengths and weaknesses in relation to working within a customer service role
Apply the techniques of self-assessment to look at strengths and weaknesses
Prepare a personal development plan that helps to achieve personal goals and development needs
Review and update your personal development plan

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Apprentice Showcase		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
Take ownership for keeping your service knowledge and skills up-to-date	B13.1 Conduct a **self-assessment** to identify their **strengths and weaknesses** in relation to the job role	*B13.3 Review the effectiveness of their personal development plan and update it accordingly*
Consider personal goals and propose development that would help achieve them	B13.2 Produce a **personal development plan** to support the achievement of their agreed learning and development goals	

Amplification and guidance
• **Personal development plan**   o A description of strengths and weaknesses, goals, reflection and planning regarding self-improvement within the organisation

Being open to feedback
What do I need to SHOW
Identify suitable ways of obtaining informal and formal feedback from others
Obtain useful and constructive feedback about your own service skills and knowledge from others
Positively respond to all feedback
Use the feedback received to take responsibility for maintaining and developing your personal customer service skills and knowledge

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Apprentice Showcase		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
Act on and seek feedback from others to develop or maintain personal service skills and knowledge	B14.1 Seek **constructive feedback** about their customer service skills and knowledge from others B14.2 Use feedback from others to develop their customer service skills and knowledge	*There are no distinction criteria for this component*

Amplification and guidance
• **Constructive feedback**   ○ Can be positive or negative

Team Working
What do I need to SHOW
Demonstrate the interpersonal skills required to work effectively as part of a team
Communicate consistently with team members in the interest of helping customers
Demonstrate cooperation when working with others
Share personal learning with others to support good practice
Present your ideas and recommendations for improvements in customer service to others

Apprentice Showcase		
The apprentice will	**Assessment Criteria**	**Distinction Criteria**
Frequently and consistently communicate and work with others in the interest of helping customers efficiently	B15.1 Work with others in a positive and **productive manner** B15.2 Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently	B15.4 *Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers*
Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice	B15.3 Share personal learning and information with others to support good customer service practice	B15.5 *Present **reasoned ideas** for improving customer service practice to the appropriate colleagues*
Amplification and guidance		
• **Productive manner** o Working in a way that ensures the desires result is achieved		

Equality – treating all customers as individuals
What do I need to SHOW
Treat all customers equally, ensuring that you comply with legal requirements
Recognise and respond to individual needs to provide a personalised customer service experience
Act in a way that upholds the core values and service culture of the organisation

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Practical Observation		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
Treat customers as individuals to provide a personalised customer service experience	B16.1 Recognise and respond to individual needs to provide **a personalised customer service experience**	*There are no distinction criteria for this component*
Uphold the organisation's core values and service culture through your actions	B16.2 Behave in a way that upholds the **core values** and **service culture** of the organisation	

Amplification and guidance

- **A personalised customer service experience**
  - o Treating the customers as individuals (to make them feel special)
- **Core values**
  - o Guiding principles that dictate behaviour and action
- **Service culture**
  - o How the business the candidate works for does things

Presentation – dress code, professional language

	What do I need to SHOW
Face-to-face	Present a tidy and professional image
	Know and follow organisational dress code
	Be approachable and welcoming when dealing with customers face-to-face
	Or
Non-facing	Use a welcoming and approachable tone when in non-face to face situations
	Present a positive attitude with all customers and in various situations
All	Maintain professional and positive language in all situations
	Be confident and calm in difficult situations

Practical Observation		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
Demonstrate professional pride in the job through appropriate dress and positive and confident language	B17.1 **Face to face:** Present a professional image in line with the organisational **dress code** and **code of conduct** **Or** **Non-facing:** Demonstrate a positive attitude and welcoming approach consistently when dealing with customers B17.2 Maintain professional and positive language consistently in customer interactions	*There are no distinction criteria for this component*

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Amplification and guidance
Dress code   - E.g. mandatory clothing required for work or a uniform   **Code of conduct**   - Rules set out by an organisation

'Right first time'
What do I need to SHOW
Make initial approach to customers in professional manner following organisational procedures
Establish customers' needs from customers' wants
Work towards meeting customers' needs
Adapt tone and behaviour to meet customers' needs and expectations
Recognise customers' expectations
Manage customers' expectations
Check customer satisfaction
Remain positive and professional when explaining when customers' needs and/or expectations cannot be met
Establish initial contact with customers
Recognise customers' wants, needs and expectations
Take responsibility and work with customers to achieve an outcome
Maintain contact with customers where necessary and as promised (even if no additional information is available)
Refer customers to others as required accurately passing on necessary information
Follow up as required to ensure outcome is reached
Following organisational procedures, check customer satisfaction

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Practical Observation		
The apprentice will	*Assessment Criteria*	*Distinction Criteria*
Use communication behaviours that establish clearly what each customer requires and manage their expectations.	B18.1 Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging B18.2 They will show an ability to establish needs and expectations, working towards meeting them where possible, explaining when necessary when they cannot be met B18.3 Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures	*There are no distinction criteria for this component*
Take ownership from the first contact and then take responsibility for fulfilling your promise.	B18.4 Demonstrate recognition of own role, responsibilities, **level of authority** and organisational procedures when dealing with customers B18.5 Take ownership from beginning to end, building and maintaining a relationship with the customer B18.6 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	

Amplification and guidance

- **level of authority**
  - o what the candidate can deal with and what will need to be referred to management etc.