

Level 2 Customer Service Practitioner

EPA-Kit

Assessing the Apprentice Showcase

- Apprentice showcase guidance
- Before the assessment
- Apprentice showcase brief and criteria
- Sample report and presentation format

The apprentice showcase - guidance

The apprentice showcase should be compiled **after** 12 months of on-programme learning and should comprise work that is solely that of the apprentice. With guidance from the employer and/or training provider, the apprentice will select appropriate examples from their on-programme work to demonstrate the minimum requirements of certain standards.

The apprentice will present their showcase to the end-point assessor remotely or face-to-face. Their work can be either:

- a) submitted as a written report with a word count recommended to be approximately **4,500 words** plus an interview lasting up to **30 minutes** for additional questioning by the assessor

or

- b) a real-time presentation (either in person or by forms that allow audio recording) – recommended to be approximately **45 minutes** plus an interview lasting up to **30 minutes** for additional questioning by the assessor

The apprentice can submit supplementary evidence within an appendix to accompany the showcase, which may include customer feedback, recordings, manager statements and witness testimonies. This supplementary evidence will not form part of the overall word count.

The apprentice showcase (report only) can be submitted in any format, but if submitting via Dropbox or e-portfolio please allow access to only the specific work of the candidate who is due to be assessed.

As part of the showcase, all apprentices will be given the opportunity to expand on the criteria within an interview led by the end-point assessor. This interview will last up to 30 minutes and will provide the assessor with an opportunity to delve deeper into their learning and experience. This will also ensure the apprentice is given ample opportunity to evidence the required assessment criteria. Apprentices are permitted to bring their report or presentation slides with them to the interview. The interview for the showcase is likely to take place just before the professional discussion.

During the interview, the questions asked by the assessor will be open and will not lead the apprentice. This interview will centre around the criteria not met by the apprentice in the showcase report/presentation or where criteria require further expansion.

Before the assessment

- Employers/training providers should brief the apprentice on the requirements of the apprentice showcase.
- It is important that the apprentice knows in good time that they must produce an apprentice showcase, and that they have the opportunity to collect appropriate evidence (customer feedback, recordings, manager statements, and witness statements as well as evidence from others, such as mid and end-of-year performance reviews, and feedback)
- Arrangements for confirming the authenticity of the apprentice showcase should be agreed and implemented
- In readiness for end-point assessment, the employer/training provider should give the apprentice the Highfield Apprentice Showcase Brief
- The apprentice should use the brief to guide them in pulling together their showcase, including the use of appropriate evidence gathered on-programme
- The apprentice should check that all the required evidence standards are covered, and that they are prepared to present the showcase to the end-point assessor
- In the case of the apprentice opting for a presentation, it is suggested that a trial run is carried out by the apprentice in advance of the end-point assessment with the training provider/employer giving feedback on any areas for improvement

Apprentice showcase brief and criteria

In this brief, apprentices are asked to carry out 3 tasks that will cover all the relevant parts of the standard. These tasks should be covered in 1 report or presentation.

1. **Understanding your own organisation and what it does**
2. **Customer service essentials** - this covers the background knowledge and understanding of the systems, legislation and personal organisation necessary to be able to function in a customer service environment
3. **Customer service in action** - this is all about how the apprentice has dealt with customers and their expectations effectively

The apprentice has a choice as to how to approach the showcase, and this can be done by either:

- submitting a written report
- or**
- undertaking a presentation to the end-point assessor through a suitable format that can have an audio recording or be witnessed in person

Once the apprentice has chosen either the report or the presentation, they must keep that format of presenting throughout the showcase.

The apprentice can submit supplementary evidence within an appendix to accompany the showcase, which may include customer feedback, recordings, manager statements and witness testimonies.

This supplementary evidence will not form part of the overall word count.

As part of the showcase, all apprentices will be given the opportunity to expand on the criteria within an interview led by the end-point assessor. This interview will last up to 30 minutes and will provide the assessor with an opportunity to delve deeper into their learning and experience. This will also ensure the apprentice is given ample opportunity to evidence the required assessment criteria. Apprentices are permitted to bring their report or presentation slides with them to the interview. The interview for the showcase is likely to take place just before the professional discussion.

During the interview, the questions asked by the assessor will be open and will not lead the apprentice. This interview will centre around the criteria not met by the apprentice in the showcase report/presentation or where criteria require further expansion.

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages.

The following pages contain the tasks the apprentice will be required to meet in either the report or presentation. Highfield has provided an example structure at the end of this section including a recommended word count.

Apprentices meeting **all** pass criteria will be awarded a pass.

If 7 out of 10 distinction criteria are also met, the result will be a distinction.

Task 1

Understanding your organisation and what it does	
Report	Presentation
To pass this task, you must meet the criteria contained within the following pages.	
<p>Produce a report that describes your organisation and what it does. You should include knowledge of your organisation and the products and services it offers by covering:</p> <ul style="list-style-type: none">- the aims of the organisation- the organisation's brand promise- the organisation's core values and service culture- the policies and procedures that affect your customer service role- the social media policy- the features and benefits of products and services- how you maintain your knowledge of products and services	<p>Prepare and deliver a presentation that describes your organisation and what it does. You should include knowledge of your organisation and the products and services it offers by covering:</p> <ul style="list-style-type: none">- the aims of the organisation- the organisation's brand promise- the organisation's core values and service culture- the policies and procedures that affect your customer service role- the social media policy- the features and benefits of products and services- how you maintain your knowledge of products and services

Assessment criteria	Distinction criteria
<p>Understanding the organisation</p> <p>K2.1 State the aims of the organisation in relation to its sector</p> <p>K2.2 State what is meant by the organisation's 'brand promise'</p> <p>K2.3 Explain how the organisation's core values relate to its service culture</p> <p>K2.4 State the purpose of different organisational policies and procedures that affect their customer service role</p> <p>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</p>	<p>K2.6 Explain how the organisational policies and procedures impact on the delivery of customer service</p>
<p>Product and service knowledge</p> <p>K7.1 Explain the difference between the features and benefits of products and/or services in relation to the organisation</p> <p>K7.2 Describe how to maintain their knowledge of the organisation's products and/or services</p>	<p>K7.3 Explain why it is important to update their knowledge on the organisation's products and/or services.</p>

Task 2

Customer service essentials	
Report	Presentation
To pass this task, you must meet the criteria contained within the following pages.	
<p>Produce a report that describes how you organise yourself in your customer service role. You should undertake research into the regulation and legislation relevant to your own role and organisation, and the systems and technology you use. Your showcase should cover:</p> <ul style="list-style-type: none">- legislation and regulation- technology and systems- planning and prioritising tasks- confidentiality- health and safety	<p>Prepare and deliver a presentation that describes how you organise yourself in your customer service role. You should undertake research into the regulation and legislation relevant to your own role and organisation, and the systems and technology you use. Your showcase should cover:</p> <ul style="list-style-type: none">- legislation and regulation- technology and systems- planning and prioritising tasks- confidentiality- health and safety

Assessment criteria	Distinction criteria
<p>Meeting regulations and legislation</p> <p>K3.1 Explain how the relevant legislation and regulations affect the organisation's customer service provision</p> <p>K3.2 State their responsibilities for keeping information confidential in the organisation</p> <p>K3.3 State the responsibilities of employees and employers under the Health and Safety at Work Act</p>	<p>K3.4 Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations</p> <p>K3.5 Explain how a code of practice or ethical standards affects customer service</p>
<p>Systems and resources</p> <p>K4.1 Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively</p> <p>K4.2 Describe the measures and evaluation tools used in the organisation to monitor customer service levels</p>	<p><i>There are no distinction criteria for this component</i></p>
<p>Personal organisation</p> <p>S11.1 Prioritise and plan the completion of tasks according to agreed deadlines</p> <p>S11.2 Use appropriate tools and techniques to monitor the progress of tasks completion</p>	<p>S11.3 Respond in a professional manner to challenges and changes and adjust priorities accordingly</p>

Task 3

Customer service in action	
Report	Presentation
To pass this task, you must meet the criteria contained within the following pages.	
<p>Produce a report covering real examples of how you conduct yourself within your customer service role. Within your showcase you should provide examples of:</p> <ul style="list-style-type: none"> - how to influence others - dealing with customer conflict and challenge - how to develop yourself - being open to feedback - working in a team 	<p>Prepare and deliver a presentation that covers real examples of how you conduct yourself within your customer service role. Within your showcase you should provide examples of:</p> <ul style="list-style-type: none"> - how to influence others - dealing with customer conflict and challenge - how to develop yourself - being open to feedback - working in a team

<i>Assessment criteria</i>	<i>Distinction criteria</i>
<p>Influencing skills</p> <p>S10.1 Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation</p> <p>S10.2 Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs</p> <p>S10.3 Handle customer objections in a positive and professional manner</p>	<p>S10.4 Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached</p>
<p>Dealing with customer conflict and challenge</p> <p>S12.1 Maintain calm and patient at all times when dealing with challenging customer situations</p> <p>S12.2 Demonstrate sensitivity to, and interest in, the customers' concerns</p> <p>S12.3 Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers</p> <p>S12.4 Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures</p> <p>S12.5 Keep customers informed of progress while resolving issues</p>	<p>S12.7 Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.</p>

S12.6 Maintain accurate record of customer issues and progress to resolution	
Developing self B13.1 Conduct a self-assessment to identify their strengths and weaknesses in relation to the job role B13.2 Produce a personal development plan to support the achievement of their agreed learning and development goals	B13.3 Review the effectiveness of their personal development plan and update it accordingly
Being open to feedback 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 (include examples of how you have sought and used feedback)	<i>There are no distinction criteria for this component</i>
Team working 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 B15.3 Share personal learning and information with others to support good customer service practice	B15.4 Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers B15.5 Present reasoned ideas for improving customer service practice to the appropriate colleagues

Sample Report Format

Customer Service Practitioner Apprentice Showcase

Name:

Date of Birth:

Employer:

Task 1- Understanding your organisation and what it does.

The aims of the organisation

- Approximately 100-150 words

The organisation's brand promise

- Approximately 100-150 words

The organisation's core values and service culture

- Approximately 100-150 words

The policies and procedures that affect your customer service role

- Approximately 150-200 words

The social media policy

- Approximately 50-100 words

Features and benefits of products and services

- Approximately 150-200 words

How you maintain your knowledge or products and services

- Approximately 100-150 words

Task 2- Customer Service Essentials

Legislation and regulation

- Approximately 300 words

Technology and systems

- Approximately 200-300 words

Planning and prioritising tasks

- Approximately 200-300 words

Confidentiality

- Approximately 200-250 words

Health and Safety

- Approximately 150-250 words

Task 3- Customer service in action**How to influence others**

- Approximately 400 words

Dealing with customer conflict and challenge

- Approximately 400 words

How to develop yourself

- Approximately 400 words

Being open to feedback

- Approximately 400 words

Working in a team

- Approximately 400 words

Appendix

Any supporting evidence or examples of:

- customer feedback
- manager statements
- witness testimonies
- emails
- letters
- feedback

Sample Presentation Format

Customer Service Practitioner Apprentice Showcase

Name:

Date of Birth:

Employer:

Task 1- Understanding your organisation and what it does.

Approximately 10 minutes

Slide 1

The aims of the organisation

Slide 2

The organisation's brand promise

Slide 3

The organisation's core values and service culture

Slide 4

The policies and procedures that affect your customer service role

Slide 5

The social media policy

Slide 6

Features and benefits of products and services

Slide 7

How you maintain your knowledge or products and services

Task 2- Customer Service Essentials

Approximately 15 minutes

Slide 8

Legislation and regulation

Slide 9

Technology and systems

Slide 10

Planning and prioritising tasks

Slide 11

Confidentiality

Slide 12

Health and safety

Task 3- Customer service in action

Approximately 20 minutes

Slide 13

How to influence others

Slide 14

Dealing with customer conflict and challenge

Slide 15

How to develop yourself

Slide 16

Being open to feedback

Slide 17

Working in a team

Appendix

Slide 18

Any supporting evidence or examples of:

- customer feedback
- manager statements
- witness testimonies
- emails
- letters
- feedback