

Level 2 Customer Service Practitioner

EPA-Kit

Assessing the Practical Observation

- The practical observation - guidance
- The practical observation – mock assessment
- Practical observation criteria

The practical observation – guidance

The end-point assessment plan states that the practical observation should be no longer than 90 minutes, will be pre-planned and scheduled at a time when the apprentice will be in their normal place of work.

The end-point assessor and will carry out the practical observation that should enable the apprentice to evidence their skills, knowledge and behaviour from across these standards to demonstrate genuine and demanding work objectives.

During the practical observation, where possible, situations and evidence such as customer interactions should be naturally occurring, however, to ensure that all criteria can be covered, some simulation will be allowed to ensure total coverage of the standards. This can be arranged before the assessment takes place to give the best opportunity for all criteria to be met. It is recommended that employers/training providers ensure that customers are available during the assessment so that simulation is not required.

Where it is not possible for the apprentice to evidence the criteria available due to a situation not arising, the criteria may be carried over to the professional discussion. Criteria **cannot** be carried over if they have been attempted but not passed.

Before the assessment

- Employers/training providers should plan a relevant observation activity, or series of activities, that provide the apprentice with the opportunity to demonstrate each of the required standards outlined in the following pages. The practical observation activities should provide the apprentice with opportunities to:
 - show direct customer contact
 - show contact with team members
 - make decisions

Employers/training providers should:

- ensure the apprentice knows the date and location of the assessment
- ensure that the assessment schedule information is available and up to date and that all necessary rooms and resources are booked
- brief the apprentice on the activities to be carried out and the duration of the assessment (90 minutes)
- ensure the apprentice knows which customer service practitioner standards will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard

- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

It is suggested that a trial run is carried out by the apprentice in advance of the EPA with the training provider/employer giving feedback on any areas for improvement.

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages. Apprentices need to meet **all pass criteria** to be awarded a pass, and all pass and 4 of the 5 distinction criteria to be awarded a distinction.

If the apprentice fails the practical observation, Highfield will offer a resit of this assessment component to the apprentice along with an additional professional discussion follow up of 30 minutes if a suitable situation to evidence the criteria did not occur.

The practical observation - mock assessment

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that they experience a trial or mock observation in preparation for the real thing.

The most appropriate form of mock will depend on the apprentice's setting and the resources available at the time.

In designing a mock assessment, the employer/training provider should include the following elements in their planning:

- the mock observation should take place in a real workplace, or a realistic simulation if the real workplace does not present all the required assessment opportunities:
 - it is strongly recommended that the mock observation has been practised beforehand and all personnel involved are properly briefed on their roles
 - the roles should provide the opportunity for the apprentice to demonstrate both the 'pass' level and the 'distinction' level criteria
- a 90-minute time slot should be available for the complete observation, if it is intended to be a complete mock observation covering all relevant standards. However, this time may be split up to allow for progressive learning
- consider a video recording of the mock and allow the mock to be observed by other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock with each apprentice
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. The observation criteria sheet later in this guide may be used for this purpose

The 90 minutes should involve the apprentice dealing with customers as part of their normal duties and should cover:

Assessment criteria	Face-to-face	Non-facing
Interpersonal skills	Willingness to engage with a customer as well as rapport building	
Communication	Confidence in approaching and communication with customers using appropriate body language and summarising	Using appropriate communication skills to make initial customer contact and adapting tone and behaviour, when necessary
Equality – treating all customers as individuals	Recognising and responding to individual needs while upholding the core values and service culture of the organisation	
Presentation – dress code, professional language	Being appropriately dressed/presented for the role in line with organisational dress code and code of conduct	Demonstrating positive attitude and maintaining professional and positive language consistently
Right first time	Taking ownership and remaining confident during challenging situations	
Personal organisation	Prioritising, understanding and undertaking duties appropriately, effective time management and being prompt	

Practical Observation Criteria

During the observation, which will last approximately 90 minutes, the following standards should be evidenced. Apprentices should prepare for the observation by considering how the criteria can be met. The apprentice can only achieve a distinction by covering all of the pass and 4 out of 5 distinction criteria listed below.

Interpersonal skills	
<i>Assessment criteria</i>	<i>Distinction criteria</i>
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	
S8.3 Show willingness to work with others and share ideas where appropriate	
	S8.5 Demonstrate ability to balance the needs and expectations of the customer with that of the organisation
	S8.6 Pro-actively work with others to ensure efficient customer service delivery

Communication

<i>Assessment criteria</i>	<i>Distinction criteria</i>
<p>S9.1 Face to face'. Demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills</p> <p>S9.2 Adapt tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations</p> <p>S9.3 Demonstrate ability to recognise when to summarise and the techniques to use</p> <p>S9.4 Non- facing'. Demonstrate ability to make initial customer contact and make use of appropriate communication skills</p> <p>S9.5 Adapts tone and behaviour when necessary, recognising and confirming understanding of needs and expectations</p> <p>S9.6 Demonstrates ability to recognise and use reinforcement techniques during customer interactions</p>	<p>S9.7 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>S9.8 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>

Presentation/dress code	
<i>Assessment criteria</i>	<i>Distinction criteria</i>
<p>B17.1 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>B17.2 Maintain professional and positive language consistently in customer interactions</p>	<p><i>There are no distinction criteria for this component</i></p>

“Right first time”

Assessment criteria	Distinction criteria
<p>B18.1 Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging</p> <p>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</p> <p>B18.3 Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures</p> <p>B18.4 Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers</p> <p>B18.5 Take ownership from beginning to end, building and maintaining a relationship with the customer</p> <p>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</p>	<p><i>There are no distinction criteria for this component</i></p>

Equality	
<i>Assessment criteria</i>	<i>Distinction criteria</i>
<p>B16.1 Recognise and respond to individual needs to provide a personalised customer service experience</p> <p>B16.2 Behave in a way that upholds the core values and service culture of the organisation</p>	<p><i>There are no distinction criteria for this component</i></p>