

# Level 2 Customer Service Practitioner

EPA-Kit

## Assessing the Professional Discussion

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## The professional discussion - guidance

The professional discussion will be a structured discussion between the apprentice and the end-point assessor.

This will follow the observation in order to establish the apprentice's understanding and application of the set criteria of knowledge, skills and behaviours.

The professional discussion can be used to pick up any criteria that weren't evidenced during the observation due to a suitable situation not arising.

The professional discussion will need to take place in a suitable environment and should last for a **maximum of 1 hour**. The discussion will be against set criteria outlined in the following pages and it will be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence.

The purpose of the professional discussion is to clarify any questions the end-point assessor has for specified standards, and they will:

- confirm and validate judgements about the quality of work
- explore aspects of the work, including how it was carried out, in more detail
- ask questions in relation to personal development and reflection
- provide a basis for the end-point assessor to make a decision about the grade to be awarded

### Before the assessment:

Employers/training providers should:

- plan the professional discussion to allow the apprentice the opportunity to demonstrate each of the required standards
- ensure the apprentice knows the date and location of the assessment
- ensure the apprentice knows which customer service practitioner criteria 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 end-point assessment 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 meeting all pass criteria will be awarded a pass, if 3 out of 4 distinction criteria are also met the result will be a distinction.

## The professional discussion – 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 professional discussion 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 consider the following elements in their planning:

- a 1-hour time slot should be available for the complete professional discussion, if it is intended to be a complete mock assessment covering all relevant standards, however this time may be split up to allow for progressive learning
- consider an audio recording of the mock, and to 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 professional discussion criteria sheet later in this guide may be used for this purpose
- structured 'open' questions should be used as part of the professional discussion that do not lead the candidate but allows them to express their knowledge in a calm and comfortable manner. Some examples of this may include the following:
  - knowing your customers
    - Who are your internal and external customers and how do you ascertain the needs of certain customers and adapt your service approach?
  - your role and responsibility
    - How do you achieve agreed targets and goals?
  - customer experience
    - How does an understanding of the facts be used to create a customer-focused experience?

## Professional Discussion Criteria

Throughout the 1-hour professional discussion, the assessor will review the apprentice's competence in all of the pass criteria outlined below as a minimum, therefore apprentices should prepare for the professional discussion by considering how the criteria can be met.

The apprentice can only achieve distinction by covering 4 out of 5 of the distinction criteria, which are outlined in the distinction column.

<b>Knowing your customers</b>	
<i>Assessment criteria</i>	<i>Distinction criteria</i>
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
K1.2 Describe the specific needs of different customers, including those protected under current Equality law	K1.5 Explain the difference in the way internal and external customer relationships are managed
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

<b>Your role and responsibility</b>	
<i>Assessment criteria</i>	<i>Distinction criteria</i>
K5.1 Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation	<i>There are no distinction criteria for this component</i>
K5.2 Describe how to achieve their agreed targets and goals	

<b>Customer experience</b>	
<i>Assessment criteria</i>	<i>Distinction criteria</i>
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
K6.2 Explain how to build trust with customers and the importance of doing so	