

Level 3 Customer Service Specialist

EPA-Kit

Delivering the Standard

- Business knowledge and understanding
- Customer journey knowledge
- Knowing your customers and their needs/customer insight
- Customer service culture and environment awareness
- Business focused service delivery
- Providing a positive customer experience
- Working with your customers/customer insights
- Customer service performance
- Service improvement
- Develop self
- Ownership/responsibility
- Team working
- Equality
- Presentation

The Customer Service Specialist Apprenticeship Standard

The following pages contain the Customer Service Specialist Apprenticeship Standard and the assessment criteria in a suggested format that is suitable for delivery.

Business Knowledge and Understanding

Knowledge

Understand your organisation's current business strategy in relation to customers and make recommendation for its future

Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation

Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions

Understand the impact your service provision has on the wider organisation and the value it adds

Understand a range of leadership styles and apply them successfully in a customer service environment

Work based project (supported by interview)

Assessment Criteria	Distinction Criteria
<p>K1.1 Evidence that they understand the impact of the organisations mission statement and business strategy on customer service delivery and make recommendations for future improvements.</p> <p>K1.2 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 role.</p>	<p><i>K1.3 Ability to consider the possible impact on their organisation of not considering the future in decision making.</i></p> <p><i>K1.4 Provides evidence to show when they analyse the risks and opportunities to implementing change.</i></p>

Professional Discussion (supported by portfolio evidence)

Assessment Criteria	Distinction Criteria
<p>K1.5 Ability to describe their role in meeting their organisations customer service standards and its impact upon other departments.</p> <p>K1.6 Evidence of how they identify the different types of leadership styles that work best in their customer environment.</p>	<p><i>K1.7 Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach.</i></p>

Amplification and Guidance

- **Mission statement**
 - A mission statement is a short statement of an organisation's purpose, identifying the goal of its operations
- **Business Strategy**
 - A summary of how a business plans to achieve its goals and improves and sustains its position in the industry
- **Leadership Styles**
 - A leadership style is a leader's style of providing direction, implementing plans, and motivating people. Examples of this may include: transformational, transactional, servant, autocratic, democratic and bureaucratic
- **Future-focused approach**
 - This is completed through a SWOT or PESTLE analysis to identify factors that might influence future customer service strategy or activities

Customer Journey Knowledge

Knowledge

Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience

Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation

Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention

Understand commercial factors and authority limits for delivering the required customer experience

Work based project (supported by interview)

Assessment Criteria	Distinction Criteria
<p>K2.1 Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.</p> <p>K2.2 An understanding of the underpinning business processes that support them on bringing about the best outcome for customer and their organisation</p>	<p><i>There are no distinction criteria for this component</i></p>

Professional Discussion (supported by portfolio evidence)

Assessment Criteria	Distinction Criteria
<p>K2.3 Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.</p> <p>K2.4 Ability to adhere to their organisations service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.</p>	<p><i>There are no distinction criteria for this component</i></p>

Amplification and Guidance

- **Limit of their authority**
 - The decisions that certain staff members can make in a business. This includes exchanges and refunds. In certain situations, a staff member must confer with a higher level of authority, before taking a decision.
- **Specialist attention**

- These are contractual obligations or SLAs that ensure customer requests for service are met. This may also be what the customer requires if an issue cannot be resolved at the first line of customer service.
- **Underpinning business processes**
 - Complaint handling policy/procedure, customer management systems, feedback processes, incentives and penalties

Knowing your customers and their needs/Customer Insight

Knowledge

Know your internal and external customers and how their behaviour may require different approaches from you

Understand what drives loyalty, retention and satisfaction and how they impact on your organisation

How to analyse, use and present a range of information to provide customer insight

Understand different customer types and the role of emotions in bringing about a successful outcome

Understand how customer expectations can differ between cultures, ages and social profiles

Professional Discussion (supported by portfolio evidence)

Assessment Criteria	Distinction Criteria
K3.1 Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations. K3.2 Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.	<i>There are no distinction criteria for this component</i>

Practical Observation (including Q&A)

Assessment Criteria	Distinction Criteria
K3.3 Demonstrates how they analyse, use and present a range of information in order to provide customer insight. K3.4 An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.	<i>There are no distinction criteria for this component</i>

K3.5	Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.	
Amplification and Guidance		
<ul style="list-style-type: none"> • Customer types <ul style="list-style-type: none"> ○ Internal, external, business/corporate, domestic, vulnerable 		

Customer service culture and environment awareness		
Knowledge		
Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers		
Understand your business environment and culture and the position of customer service within it		
Understand your organisation structure and what role each department needs to play in delivering customer service and what the consequences are should things go wrong		
Understand how to find and use industry best practice to enhance own knowledge		
Professional Discussion (supported by portfolio evidence)		
Assessment Criteria	Distinction Criteria	
K4.1 Evidences knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development	<i>There are no distinction criteria for this component</i>	
Practical Observation (including Q&A)		
Assessment Criteria	Distinction Criteria	
K4.2 Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery	<i>There are no distinction criteria for this component</i>	
Work based project (supported by interview)		
Assessment Criteria	Distinction Criteria	
K4.3 Ability to discuss the internal and external factors influencing their business environment and culture	K4.7	<i>Ability to demonstrate the importance of assessing the political, economical, social, technical, legal and</i>

K4.4	Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery	<i>environmental factors that influence the operation of their organisation.</i>
K4.5	Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service	
K4.6	Ability to identify potential causes of service failure and the consequences of these	

Business focused service delivery

Skills	
Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice	
Resolve complex issues by being able to choose from and successfully apply a wide range of approaches	
Find solutions that meet your organisations needs as well as the customer requirements	
Practical Observation (including Q&A)	
Assessment Criteria	Distinction Criteria
S1.1 Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.	<i>S1.3 Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.</i>
S1.2 An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements	
Work based project (supported by interview)	
Assessment Criteria	Distinction Criteria
S1.4 Evidences when they made decisions and recommendations to improve their own customer service delivery	<i>S1.5 Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended</i>

	<i>alternative methods likely to improve results, stating reasons for choice.</i>
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Providing a positive customer experience	
Skills	
Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes	
Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy	
Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps	
Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction	
Demonstrate a cost-conscious mind-set when meeting customer and business needs	
Identify where highs and lows of the customer journey produce a range of emotions in the customer	
Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format	
Professional Discussion (supported by portfolio evidence)	
Assessment Criteria	Distinction Criteria
S2.1 Demonstrates when they have balanced the meeting of their customer and their organisations needs while showing they have considered cost implications	S2.2 <i>Evidences when they have analysed the importance of their professional image and its relationship with the organisations brand.</i>
Practical Observation (including Q&A)	
Assessment Criteria	Distinction Criteria
S2.3 Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes	S2.8 <i>Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.</i>

S2.4	Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction	
S2.5	Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures	
S2.6	Recognises when customer emotions have been affected by the level of service offered.	
S2.7	Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes	
Work based project (supported by interview)		
Assessment Criteria		Distinction Criteria
S2.9	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	<i>S2.11 Demonstrates an ability to identify trends/recurring issues and analyse why they occurred and record possible ways of addressing them to ensure they do not reoccur.</i>
S2.10	Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others	
Amplification and Guidance		
<ul style="list-style-type: none"> • Identify trends/recurring issues <ul style="list-style-type: none"> ○ Customer satisfaction surveys, complaint resolution and escalation analysis, customer feedback, market indicators ○ Knowledge of a range of questioning techniques, active listening, note taking 		

Working with your customers/customer insights

Skills

Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implications and facts and act upon it

Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service

Work based project (supported by interview)

Assessment Criteria	Distinction Criteria
S3.1 Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements.	S3.3 <i>Demonstrates how knowing their customer and their needs has a direct impact on:</i> <i>a. Their working practices</i> <i>b. Organisational policy/procedures</i>
S3.2 Ability to gather and analyse information about the types of customers their organisation has and explain how the service they provide meets their potential needs and expectations.	S3.4 <i>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.</i>

Customer service performance

Skills	
Maintain a positive relationship even when you are unable to deliver the customers expected outcome	
When managing referrals or escalations take into account historical interactions and challenges to determine next steps	
Practical Observation (including Q&A)	
Assessment Criteria	Distinction Criteria
<p>S4.1 Evidence when they have maintained a positive relationship even when they are unable to deliver the customers expected outcome.</p> <p>S4.2 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><i>There are no distinction criteria for this component</i></p>

Service Improvement

Skills

Analyse the end to end service experience, seeking input from others where required supporting development of solutions

Make recommendations based on your findings to enable improvement

Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice

Work based project (supported by interview)

Assessment Criteria	Distinction Criteria
S5.1 Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers	S5.4 <i>Evidence to support their research and analysis of customer service standards and mission statements of other organisations, in comparison to their own organisations to inform their recommendations.</i>
S5.2 Evidence the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required.	
S5.3 Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.	
	S5.5 <i>Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s).</i>

Amplification and Guidance

- **Qualitative and quantitative customer experience data**
 - Contract lifecycle, value, invoice and payment terms, contract time and resolution rates, number and types of plaudits and complaints
 - Examples of collating and using information to aid decision making, actions taken and results
 - Recognises areas where improvements can be made and provides options or recommendations of how improvements can be implemented
 - Knowledge of relevant legislation, regulatory guidance and its impact on decision making

Develop self

Behaviour

Proactively keep your service, industry and best practice knowledge and skills up-to-date

Consider personal goals related to service and take action towards achieving them

Professional Discussion (supported by portfolio evidence)

Assessment Criteria	Distinction Criteria
<p>B1.1 Provides evidence to demonstrate 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 the industry and best practice.</p>	<p><i>B1.2 Evidences when they have assessed the impact of sharing their own knowledge on:</i></p> <ul style="list-style-type: none"> <i>a. Their development</i> <i>b. Colleague development</i>

Amplification and Guidance

- **Learning and development goals**
 - Reaching performance standards and acquiring new knowledge or skills
 - E-learning, workbooks, training, coaching or mentoring
 - Explanation of SMART objectives and at least one example where they have been applied in personal development plan

Ownership/Responsibility

Behaviour

Personally, commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation

Exercises proactivity and creativity when identifying solutions to customer and organisational issues

Make realistic promises and deliver on them

Professional Discussion (supported by portfolio evidence)

Assessment Criteria

Distinction Criteria

B2.1 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.

There are no distinction criteria for this component

Practical Observation (including Q&A)

Assessment Criteria

Distinction Criteria

B2.2 Evidences 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.

There are no distinction criteria for this component

B2.3 Shows proactivity and creativity when identifying solutions to customer and organisational issues.

Amplification and Guidance

- **Appropriate communication techniques**
 - Range of communication methods verbal & non-verbal – telephone, email, social media, letters
 - Use of effective communication in reducing conflict – remaining calm/demonstrating empathy

Team Working

Behaviour

Work effectively and collaboratively with colleagues at all levels to achieve results

Recognise colleagues as internal customers

Share knowledge and experience with others to support colleague development

Professional Discussion (supported by portfolio evidence)

Assessment Criteria

Distinction Criteria

B3.1 Demonstrate sharing own knowledge and experience with others, to support colleague development

There are no distinction criteria for this component

Practical Observation (including Q&A)

Assessment Criteria

Distinction Criteria

B3.2 Demonstrates achievement of results through effective teamwork and collaboration with colleagues at all levels.
B3.3 Shows adaptability of own skills when working with internal customers.

There are no distinction criteria for this component

Equality

Behaviour

Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer

Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment

Practical Observation (including Q&A)

Assessment Criteria

Distinction Criteria

B4.1 Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.

There are no distinction criteria for this component

B4.2	Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.	
Amplification and Guidance		
<ul style="list-style-type: none"> • Equality, diversity and inclusion <ul style="list-style-type: none"> ○ Protected 9 characteristics: Age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation ○ Inclusive customer service for diverse groups of customers – policies/facilities such as access to information in different languages, large print on documents, hearing loops 		

Presentation		
Behaviour		
Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction		
Ensure your personal presentation, in all forms of communication, reflects positively on your organisations brand		
Practical Observation (including Q&A)		
Assessment Criteria	Distinction Criteria	
B5.1 Demonstrate brand advocacy , values and belief when dealing with customer requests to build trust, credibility and satisfaction.	<i>There are no distinction criteria for this component</i>	
B5.2 Evidence to show how their personal presentation made a positive impact on their organisations brand.		
Amplification and Guidance		
<ul style="list-style-type: none"> • Brand advocacy <ul style="list-style-type: none"> ○ Organisations culture, values and beliefs ○ Organisation promotion in a good light 		