

# Level 3 Customer Service Specialist

EPA-Kit

## Assessing the Work-Based Project Supported by an Interview

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## **Work-based project supported by an interview - guidance**

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The work-based project is designed to ensure an apprentice's learning meets the needs of the business and is relevant for their role.

The employer should ensure that the apprentice has a suitable amount of time and the necessary resources to plan and undertake the research and produce the written report.

The work-based project is supported by an interview that takes place after the project report has been reviewed.

The apprentice must produce a **2,500-word** report based on a specific high-level challenge (such as a complaint or difficult situation) that they have had to deal with.

The report should cover the following areas:

- an explanation of what the situation was
- what actions the apprentice took
- what solutions were offered
- details of any recommendations made to change a policy or process
- any feedback from the customer
- what the apprentice's responsibilities were
- what the results were

### **Before writing the work-based project report**

Once the apprentice has identified the high-level challenge they want to write about in the project report, they should arrange a discussion with their employer/training provider.

The employer/training provider should then determine whether the proposed project has the potential to meet the criteria of the work-based project report.

If the employer/training provider deems the proposed project is suitable, the apprentice should then write a 200 to 300-word proposal of what their proposed project is and bring this proposal to the formal gateway meeting. The proposal **must** be made available to Highfield Assessment at gateway.

The end-point assessor will review the proposal of the project at the gateway meeting. The apprentice **should only start writing** their project report once the proposal has been approved by the end-point assessor.

If for any reason the proposal is not approved, the apprentice must resubmit a revised proposal within 1 week.

### **Work-based project report**

The project must be started **after** the gateway process and must be completed **within a 2-month period**.

The written report **must be a maximum of 2,500 words** in length +/- 10%, excluding any annexes, and focus on a high-level challenge the apprentice has faced such as a difficult situation or complaint.

End Point Assessors will only mark projects up to 2500 words +/- 10% (Maximum 2750 words). At which point assessors will stop marking and only credit the criteria covered to that point. Projects which fall short of the word count will be marked to achieve all potential criteria covered.

The report should contain annexes that are attributable to the apprentice and the actions that they took regarding the high-level challenge they encountered. The annexes do not contribute to the word count.

Example evidence that may be included in the annex:

- emails
- letters
- meeting notes
- call logs
- workflow documents
- feedback

**Two weeks before the date of the interview**, the apprentice should submit the completed project report to Highfield Assessment for marking.

They will then attend either a face-to-face or video conference interview to discuss the report and any supporting annexes. This interview takes place on a date that will have been discussed and agreed at gateway. The interview must take place before the end of the 3-month end-point assessment period.

The work-based project report 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.

### **Work-based project interview**

The date of the interview will be made known to the apprentice when they are in their gateway meeting with the end-point assessor. The interview is between the apprentice and the end-point assessor, however, if the employer wishes to, they can have a representative of the organisation present for the interview. The representative must not be involved with any part of the interview or the grading decision other than to observe.

The work-based written project and any supporting annexes will form the basis of the interview. The interview will last for **60 minutes (+/- 10%)** and the apprentice will be asked **10 competency-based questions** by the end-point assessor to provide the apprentice with as much opportunity as possible to evidence all the relevant KSBs or any criteria that have not been covered in the project report.

The questions the apprentice will be asked are selected from a bank available to the assessor.

The assessor can ask the apprentice to explain themselves further based on their answers to the questions but **cannot** ask any more questions outside of the competency questions.

Highfield has provided a sample report template that the apprentice can make use of should they wish. Guidance as to what each section of the report could contain is also found in this document. A mapping document has also been created for the apprentice to use to ensure coverage of the criteria outlined for this assessment method.

### **Grading the work-based project report and interview**

Apprentices will be marked against the pass and distinction criteria included in the tables starting on page 11. Apprentices need to meet **all pass criteria** to be awarded a pass, and all pass and **all of the distinction** criteria to be awarded a distinction.

### **Work-based project report and interview order**

1. Apprentice prepares a 200-300 word proposal that details what their project is going to be about. The proposal is discussed between the apprentice and the employer/training provider
2. Apprentice brings their proposal to the gateway meeting. If the proposal is approved the apprentice can start writing their project report. If the proposal is not approved the apprentice has 1 week to rewrite and resubmit this.
3. At the gateway meeting the date of the interview is discussed and set.
4. The project report must be completed within 2 months of the gateway meeting.
5. The completed project report must be submitted to Highfield 2 weeks before the interview date.
6. The end-point assessor receives, reviews and marks the project report and selects 10 competency-based questions from their question bank to use in the interview.
7. The 60-minute interview takes place.

## Work-based project interview - mock assessment

The employer/training provider should spend a suitable amount of time preparing apprentices for this end-point assessment component.

Highfield recommends that all apprentices should experience at least 1 mock interview in preparation for the real thing. The apprentice can go through as many mock interviews as they wish in order to allow them to prepare suitably.

When planning the mock assessment, the employer/training provider should take the following details into consideration.

- The interview needs to last for **60-minutes** so a suitable amount of time should be available to complete the full mock interview.
- It is recommended that the interview is split up into sections to **allow progressive learning** throughout the interview period where the apprentice can discuss their answer and ask questions as to what may help them cover the criteria in the standard more effectively.
- Audio recording the mock and/or allowing the mock to be observed by other apprentices might be beneficial. This may be necessary for certain employers/training providers if it is not practical to carry out separate mock assessments with each apprentice.
- The apprentice's performance should be assessed by a competent trainer/assessor.
- **Feedback and guidance should be shared** with the apprentice to complete the learning experience. The mock assessment document sheets found later on in this kit may be used for this purpose.
- The trainer/assessor must ask **10 structured and 'open' questions** as part of the interview that do not lead the apprentice but allow them to express their knowledge in a calm and comfortable manner.

Example questions that could be used as part of the mock the interview may include the following:

- Business knowledge and understanding
  - What is the impact of the organisation's mission statement?
  - How does the organisation's mission statement affect our customer service?
- Providing a positive customer experience
  - How is data analysed, used and presented?
  - How does data collected impact the customer journey?
- Service improvement
  - What do you do with customers' data once it has been analysed?
  - How does legislation affect recommendations for the future of the organisation?

## Work-based project report sample template with guidance

*(All guidance is in italics)*

### **Project Title**

*(This can be for example 'work-based project' or the name of the high-level challenge that was completed)*

Name:

Date of birth:

Employer:

Word count:

### **Section 1 - Situation**

*(This is where you should provide a brief summary of the difficult situation or complaint that you had to deal with and really where you should say what happened)*

*Criteria that could be part of this section: K2.1*

### **Section 2 - Actions**

*(What was considered? What did you have to think about before deciding what to do as a result of the situation/complaint/challenge occurring?)*

*Criteria that could be part of this section: K1.4, K2.1, K2.2, K4.3, K4.4, K4.5, K4.7*

### **Section 3 - Responsibilities**

*(Explain your responsibilities within the organisation and what your responsibilities were as part of finding the solution to the problem)*

*Criteria that could be part of this section: K4.6, S2.10, S2.11, S3.2, S5.2, S5.3, S5.4*

### **Section 4 - Solutions**

*(You should be including a summary of what solutions you offered to the customer and/or the organisation in this part)*

*Criteria that could be part of this section: K1.2, K2.1, K2.2, K4.3, K4.5, S3.2, S3.3*

### **Section 5 - Results and any business recommendations**

*(Here you should be describing any suggestions you made to the business/management. This could be things such as thinking that by changing a policy or a procedure you can stop the complaint or situation happening again in the future and what might happen if the change isn't implemented. Explain what happened as a result of your actions. You could confirm whether any recommendations were actioned, what the benefits to the organisation were and if there were any benefits to customers or staff)*

*Criteria that could be part of this section: K1.1, K1.2, K1.3, S1.5, S2.11, S3.1, S3.3, S3.4, S5.3, S5.4, S5.5*

### **Section 6 - Feedback**

*(Here you would describe any feedback received or any feedback you collected and used as part of your project to form solutions or recommendations)*

Criteria that could be part of this section: S1.4, S1.5, S2.9, S2.10, S3.1, S3.2, S3.3, S3.4, S5.1, S5.2, S5.4, S5.5

### **Appendix**

*(This does not affect the overall word count. As part of the appendix you could include things like emails, letters, meeting notes, call logs, workflow documents and feedback.)*

## Work-based project report sample criteria mapping document

Below is a sample mapping document that Highfield recommends should accompany your report when it is provided. This is to ensure coverage of the criteria outlined for this assessment method.

<b>Example Criteria Mapping Document</b>	
<b>Criteria</b>	<b>Section of the report it appears in</b>
<b>E.g. K1.4- Provides evidence to show when they analyse the risks and opportunities of implementing the change</b>	<b>Section 2 – Actions Paragraph 1</b>
<b>Business knowledge and understanding</b>	
<b>Pass Criteria</b>	
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.	
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.	
<b>Distinction Criteria</b>	
K1.3 Ability to consider the possible impact on their organisation of not considering the future in decision making.	
K1.4 Provides evidence to show when they analyse the risks and opportunities to implementing change.	
<b>Customer journey knowledge</b>	
<b>Pass Criteria</b>	
K2.1 Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.	
K2.2 An understanding of the underpinning business processes that support them on bringing about the best outcome for customer and their organisation	
<b>Customer service culture and environment awareness</b>	
<b>Pass Criteria</b>	
K4.3 Ability to discuss the internal and external factors influencing their business environment and culture	
K4.4 Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery	
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	
<b>Distinction Criteria</b>	

K4.7 Ability to demonstrate the importance of assessing the political, economical, social, technical, legal and environmental factors that influence the operation of their organisation.	
<b>Business focused service delivery</b>	
<b>Pass Criteria</b>	
S1.4 Evidences when they made decisions and recommendations to improve their own customer service delivery	
<b>Distinction Criteria</b>	
S1.5 Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended alternative methods likely to improve results, stating reasons for choice.	
<b>Providing a positive customer experience</b>	
<b>Pass Criteria</b>	
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	
S2.10 Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others	
<b>Distinction Criteria</b>	
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.	
<b>Working with your customers/customer insights</b>	
<b>Pass Criteria</b>	
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.	
S3.2 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.	
<b>Distinction Criteria</b>	
S3.3 Demonstrates how knowing their customer and their needs has a direct impact on: <ul style="list-style-type: none"> <li>a. Their working practices</li> <li>b. Organisational policy/procedures</li> </ul>	
S3.4 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.	

<b>Service improvement</b>	
<b>Pass Criteria</b>	
S5.1 Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.	
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.	
<b>Distinction Criteria</b>	
S5.4 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.	
S5.5 Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s).	

## Work-based project supported by an interview - criteria

<b>Assessment Criteria</b>	<b>Distinction Criteria</b>
<p><b>Business Knowledge and Understanding</b></p> <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>K1.3 Ability to consider the possible impact on their organisation of not considering the future in decision making.</p> <p>K1.4 Provides evidence to show when they analyse the risks and opportunities to implementing change.</p>
<p><b>Customer Journey Knowledge</b></p> <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>
<p><b>Customer service culture and environment awareness</b></p> <p>K4.3 Ability to discuss the internal and external factors influencing their business environment and culture</p> <p>K4.4 Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery</p>	<p>K4.7 Ability to demonstrate the importance of assessing the political, economical, social, technical, legal and environmental factors that influence the operation of their organisation.</p>

<p>K4.5 Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service</p> <p>K4.6 Ability to identify potential causes of service failure and the consequences of these</p>	
<p><b>Business focused service delivery</b></p> <p>S1.4 Evidences when they made decisions and recommendations to improve their own customer service delivery</p>	<p>S1.5 Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended alternative methods likely to improve results, stating reasons for choice.</p>
<p><b>Providing a positive customer experience</b></p> <p>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</p> <p>S2.10 Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others</p>	<p>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.</p>
<p><b>Working with your customers/customer insights</b></p> <p>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.</p> <p>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.</p>	<p>S3.3 Demonstrates how knowing their customer and their needs has a direct impact on:</p> <ul style="list-style-type: none"> <li>c. Their working practices</li> <li>d. Organisational policy/procedures</li> </ul> <p>S3.4 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.</p>
<p><b>Service Improvement</b></p>	<p>S5.4 Evidence to support their research and analysis of customer service standards and mission statements of other</p>

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