Level 3 Customer Service Specialist

EPA-Kit

Assessing the Professional Discussion Supported by Portfolio Evidence

- The professional discussion – guidance
- The professional discussion – mock assessment guidance
- The professional discussion – criteria

Professional discussion (supported by portfolio evidence) - guidance

The professional discussion

The professional discussion will be a structured discussion between the apprentice and the end-point assessor. The end-point assessor will ask the apprentice to discuss their time on-programme that is relevant to the criteria.

The professional discussion is used to establish whether the apprentice has gained suitable knowledge, skills and behaviours in order to evidence the set criteria.

The professional discussion should be completed face-to-face and will last for **60 minutes (+/- 10%)**.

During and after the time the apprentice spends on-programme, they should be collecting evidence of interactions with customers, managers and stakeholders that will be used as part of the professional discussion.

Portfolio of evidence

During the professional discussion, the apprentice should extract/discuss information from the on-programme portfolio of evidence they collect and build during their time on-programme. This will be used as a base to support the professional discussion and relate to the criteria relevant to the professional discussion.

The apprentice **must** submit the portfolio of evidence to Highfield Assessment **2 weeks before** the set date of the professional discussion.

The portfolio of evidence should consist of a **minimum** of 10 pieces of evidence and a **maximum** of 15 pieces and relate to the standards that apply to the professional discussion.

The portfolio of evidence is not directly assessed and will only be used as a springboard or prompt for the apprentice to be able to successfully evidence the required KSBs.

The apprentice **can** bring their portfolio of evidence with them to the professional discussion.

This portfolio of evidence **could** include things such as witness statements, customer feedback such as emails or letters, and manager feedback from one-to-ones or similar.

The portfolio of evidence 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.

The apprentice is **recommended** to number their pieces of evidence that relate to the criteria and confirm in the portfolio which piece of evidence is applicable to the relevant standard(s).

There is a portfolio of evidence mapping/matrix document at the end of this EPA-kit that can be used for the planning of this assessment method.

The evidence is used by the independent assessor in order to plan the discussion.

Grading the professional discussion with portfolio evidence

Apprentices will be marked against the pass and distinction criteria included in the tables starting on page 5. 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.

Professional discussion (supported by portfolio evidence) – mock assessment

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

Highfield recommends that the apprentice experiences at least 1 mock professional discussion in preparation for the real thing. The apprentice should be allowed to experience as many mock professional discussions as possible to allow them to prepare suitably.

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

- A **60-minute** time slot should be available for the complete professional discussion, if it is intended to be a complete mock assessment covering all relevant standards. This time may be split up to allow for progressive learning with the apprentice.
- Audio recording the mock and/or allowing the mock to be observed by other apprentices might be beneficial. This may be necessary if it is not practicable for the employer/training provider to carry out a separate mock assessment 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 later in this guide may be used for this purpose.
- The trainer/assessor should ask structured 'open' questions should be used as part of the professional discussion that do not lead the candidate, but allow them to express their knowledge, skills and behaviours in a calm and comfortable manner.

Some example questions that can be used may include the following:

- Business knowledge and understanding
    - How does your role meet the organisation's customer service standards?
    - Explain the leadership styles that were most effective for you to use in a customer service environment
- Customer journey knowledge
    - Why do customers' issues and situations need special attention within the organisation?
    - Tell me about your company's SLAs and your own level of authority and how this affects your customer service.
- Providing a positive customer experience
    - Discuss a time when you have met the needs of your customers as well as the company and what cost implications were incurred.

Professional discussion (supported by portfolio evidence) - criteria

Assessment Criteria	*Distinction Criteria*
Business knowledge and understanding K1.5 Ability to describe their role in meeting their organisations customer service standards and its impact upon other departments. K1.6 Evidence of how they identify the different types of leadership styles that work best in their customer environment.	*K1.7 Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach.*
Customer journey knowledge K2.3 Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation. 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.	*There are no distinction criteria for this component*
Knowing your customers and their needs/customer insight 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.	*There are no distinction criteria for this component*
Customer service culture and environment awareness 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	*There are no distinction criteria for this component*

Providing a positive customer experience 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 Evidences when they have analysed the importance of their professional image and its relationship with the organisations brand.
Develop self 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.	B1.2 Evidences when they have assessed the impact of sharing their own knowledge on: a. Their development b. Colleague development
Ownership/responsibility 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*
Team working B3.1 Demonstrate sharing own knowledge and experience with others, to support colleague development	*There are no distinction criteria for this component*