

Customer Service Practitioner – Level 2

Apprentice
End Point Assessment Toolkit



Customer Service Practitioner – Level 2

Congratulations on completing your learning and developing your skills in customer service. We hope you have enjoyed your journey so far.

Up to this point you should have completed the following:

- **12** months or more experience in the customer service workplace environment.
- Various learning and development activities.
- On-the-job training and/or off-the-job training.
- English and Maths (where required).
- Collection of workplace examples of how you have met the Customer Service Practitioner standards (on-programme portfolio).
- Regular progress and review meetings with your employer and/or training provider.
- Feedback and guidance from your employer and/or training provider.
- A sign-off meeting with your employer/training provider to signify that you have met the minimum requirements of the standards with regards to knowledge, skills and behaviours and that you are ready for end-point assessment.

If you have finished all of the above you are ready for the gateway.

What is the gateway?

The gateway means that you are now ready for your end-point assessment to enable you to achieve your apprenticeship programme certificate.

This is where **Active IQ** comes in. We are the end-point assessment organisation that your employer has chosen for you, and an **Active IQ** independent assessor will conduct your end-point assessment.

Who are Active IQ?

We are a leading awarding organisation and approved end-point assessment organisation that specialises in designing and delivering active leisure sector qualifications, all of which are supported by high-quality resources, such as eLearning, apprenticeship packages and professional recognition.

Your **Active IQ** independent assessor will contact you to arrange a meeting in person or over the phone to explain what you need to do next.

The following pages explain to you what end point assessment entails.

What is end-point assessment?

Your employer now feels that you are at the end of your apprenticeship and you have shown the necessary knowledge, skills and behaviours within the standard to be a Customer Service Practitioner at Level 2.

All of these skills will now need to be assessed by an independent assessment organisation (**Active IQ**) that has not met you before.

What does end-point assessment consist of?

There are three elements:

- Practical observation.
- Apprentice showcase.
- Professional discussion.

1. Practical observation

The observation will assess your skills.

Your **Active IQ** independent assessor will arrange to observe you in your normal place of work. The observation will enable you to evidence your skills, knowledge and behaviour from across the standard to demonstrate genuine and demanding work objectives.

Your **Active IQ** independent assessor will observe you at work and assess your:

- Personal presentation.
- Adherence to equality.
- Interpersonal skills.
- Communication skills.
- Personal organisational skills.

Your assessor may also observe you handling a general enquiry, dealing with a customer complaint or a need for further information or detail. You may also be observed selling a product or encouraging a customer to try a new service.

Those areas of the standard that cannot be evidenced during the observation will be discussed subsequently as part of the professional discussion with your **Active IQ** independent assessor.

The observation may be carried out on one occasion and will last for approximately one hour, or may be a combination of occasions, each lasting less than an hour but making up approximately one hour altogether.

The observation will be structured against the criteria in **Appendix B**.

The observation may take the format of a 'live' observation where your assessor watches you in your workplace or via a recording of you carrying out real work with your customers.

See further guidance
in your toolkit.



2. Apprentice showcase

The apprentice showcase will assess your knowledge.

The apprentice showcase enables you to reflect and present examples of your development over the whole on-programme period – your apprentice journey.

Your employer and/or training provider will support you in selecting the appropriate evidence from your on-programme portfolio to demonstrate the minimum requirements of the standard.

There is detailed guidance on how to present the information within your assessment pack, and it will be showcased through the completion of:

- A worksheet.
- Delivery of a presentation or induction pack.
- Personal development plan.
- Two customer service case studies.
- A line-manager testimony.

The contents of the apprentice showcase are structured against the criteria in **Appendix C**.

Your apprentice showcase will be reviewed and assessed by your independent **Active IQ** assessor.

See further guidance
in your toolkit.



3. Professional discussion

The professional discussion will assess your behaviours and attitudes.

The professional discussion is a structured discussion between you and the **Active IQ** independent assessor, following the observation, to establish your understanding and application of knowledge, skills, behaviours and attitudes.

The professional discussion will last for a maximum of one hour and will be structured against the criteria in **Appendix D**.

The purpose of the professional discussion is to:

- Clarify any questions the **Active IQ** independent assessor has from his/her assessment of the apprentice journey (apprentice showcase) and practical observation.
- Confirm and validate judgements about the quality of work.
- Explore aspects of the work, including how it was carried out, in more detail.
- Discuss how you would behave in specific scenarios, if they have not occurred within the practical observation.
- Ask questions in relation to personal development and reflection.
- Provide a basis for the **Active IQ** independent assessor to make a decision about the grade to be awarded.

The professional discussion may take place in your workplace after your 'live' observation, over the phone with your assessor or via a live webinar or 'Skype' call.

See further guidance
in your toolkit.



Grading

You can achieve a Pass or a **Distinction** for the observation, professional discussion and apprentice showcase.

For each of the three assessment methods, all Pass criteria (100%) must be achieved to progress and complete the apprenticeship programme.

For a **Distinction** to be awarded overall, you must achieve a **Distinction** in each assessment method.

Assessment	To achieve a pass	To achieve a distinction
Practical observation	You must meet all of the pass criteria (100%)	You must meet all of the pass criteria and 80% (4 out of 5) of the distinction criteria.
Apprentice showcase	You must meet all of the pass criteria (100%)	You must meet all of the pass criteria and 70% (7 out of 10) of the distinction criteria.
Professional discussion	You must meet all of the pass criteria (100%)	You must meet all of the pass criteria and 75% (3 out of 4) of the distinction criteria.
To achieve a Distinction overall you must achieve a Distinction in all of the assessments; this means a Distinction in the observation, professional discussion and the apprentice showcase.		

Putting it all together

Your **Active IQ** independent assessor will guide you on how you should put everything together for your end-point assessment.

Start putting everything you need in a designated portfolio or folder to ensure that you have everything in one place ready for your final end-point assessment.

All of the documents and information you need are available in this end-point assessment toolkit

End point assessment chain of events

01

You will complete your apprenticeship via training and experience in customer service in the workplace.

02

The training provider or employer will notify **Active IQ** that you have finished your apprenticeship and that you are ready for your end-point assessment.

03

Your contact details (name, telephone number, email address, location, employer, place of work, etc.) are sent to **Active IQ**.

04

An independent assessor will be allocated to you.

05

Your **Active IQ** independent assessor will send out an introductory letter to you.

06

A meeting/call/Skype call will be arranged to discuss and agree the plan for end-point assessment.

07

The plan is sent to you to agree and sign and return to the assessor.

08

Your employer is notified of the planned assessments.

09

Timescales and tasks are set.

10

The observation is planned, carried out, assessed and graded.

11

The apprentice showcase is planned, carried out, assessed and graded.

12

The professional discussion is planned, carried out, assessed and graded.

13

A final grading is completed and you, the training provider (if applicable) and your employer are notified.

14

You receive your certificate.

End-point assessment contents checklist

	✓ / X	Date
Have you received an introductory letter?		
Have you had an end-point assessment planning meeting?		
Have your assessments been discussed and planned?		
Have you completed/achieved the following?		
Observation		
Apprentice showcase, including:		
Worksheet		
Presentation or induction pack for a new employee		
Personal development plan, including:		
• Self-assessment		
• SWOT analysis		
• Goal-setting		
• Feedback from others		
Conflict and challenge case study		
Influencing skills case study		
Line-manager testimony		
Professional discussion		

Notes:

Customer Service Practitioner assessment plan and record of achievement

Apprentice's name:

Assessment plan		Record of achievement			
Evidence/assessment method	Standards covered	Planned assessment date/s	Pass/Refer Distinction	Assessor's signature or initials and date	IV initials (if sampled) and date
Observation					
	<ul style="list-style-type: none"> Interpersonal skills. Communication. Equality – treating all customers as individuals. Presentation – dress code, professional language. Right first time. 				
Apprentice showcase					
Presentation/induction pack	<ul style="list-style-type: none"> Understanding your organisation. Meeting the regulations and legislation. Systems and resources. Product and service knowledge. 				
Worksheet	<ul style="list-style-type: none"> Understanding your organisation. Meeting the regulations and legislation. Systems and resources. Product and service knowledge. Being open to feedback. 				
Influencing skills case study	<ul style="list-style-type: none"> Influencing skills. 				
Customer conflict case study	<ul style="list-style-type: none"> Dealing with customer conflict and challenge. 				
Manager testimony	<ul style="list-style-type: none"> Personal organisation. Team-working. 				
Personal development plan	<ul style="list-style-type: none"> Developing self. Being open to feedback. 				

Declaration		Name	Signature	Date
Apprentice's agreement	<p>I agree to be assessed according to the assessment plan and am happy that any additional support I require has been discussed and a separate plan put in place for this.</p> <p>I declare that all of the evidence (listed in the assessment plan) that will be produced for this portfolio will be my own unaided work.</p>			
Assessor's agreement	I have discussed the planned assessments with the apprentice and any additional support required has been planned and recorded separately.			

Declaration		Name	Signature	Date
Assessor's agreement	I declare that all apprentice evidence (listed in the assessment plan) has been assessed and meets the knowledge, skills and behaviours required for the end-point assessment.			
Internal verifier's agreement	I declare that all apprentice evidence (initialled in the assessment plan) has been internally verified and meets knowledge, skills and behaviours required for the end-point assessment.			

Customer Service Practitioner observation – apprentice guidance

Part 1

This is the first part of your end-point assessment.

Contents

- Apprentice guidance
- Additional criteria
- Conflict and challenge
- Influencing skills
- Customer service practitioner observation

Customer Service Practitioner observation – apprentice guidance



KEY
POINT

This is the first part of your end-point assessment.

The observation will assess your skills.

Your **Active IQ** independent assessor will arrange to observe you in your normal place of work.

The observation will enable you to evidence your skills, knowledge and behaviour from across the standard to demonstrate genuine and demanding work objectives.

Your **Active IQ** independent assessor will assess your:

- Personal presentation.
- Adherence to equality.
- Interpersonal skills.
- Communication skills.
- Personal organisational skills. .

Your assessor may also observe you handling a general enquiry, dealing with a customer complaint or a need for further information or detail. You may also be observed selling a product or encouraging a customer to try a new service.

Those areas of the standard that cannot be evidenced during the observation will be discussed subsequently as part of your professional discussion assessment.

The observation may be carried out on one occasion and will last for approximately one hour, or may be a combination of occasions, each lasting less than an hour but making up approximately one hour in total.

The observation may take the format of a 'live' observation where your assessor watches you in your workplace or via a recording of you carrying out real work with your customers.

This observation forms part of the assessment for the following standards (see **Appendix A and B** for further details of the standards covered):

- Interpersonal skills.
- Communication.
- Equality – treating all customers as individuals.
- Presentation – dress code, professional language.
- Right first time.

Additional criteria

Conflict and challenge

If you have to deal with a conflict or challenge during your planned Customer Service Practitioner observation, your assessor will complete the conflict and challenge observation checklist, which may exempt you from completing the conflict and challenge case study within your apprentice showcase.

Influencing skills

If you are observed using your influencing skills to sell or offer a product or service to a customer during your planned Customer Service Practitioner observation, your assessor will complete the influencing skills observation checklist, which may exempt you from completing the influencing skills case study within your apprentice showcase.

Observation	
Your independent assessor will:	
<ul style="list-style-type: none"> • Confirm the details of the observation with you to ensure that you completely understand the process of assessment and what is expected of you. • Confirm with your employer the requirements of the planned observation/s. • Confirm the format of your observed assessment with you. This may be a 'live' observation in your workplace, where your assessor observes you in 'real time', or you may be asked to film yourself working in your customer service role and submit this to your assessor. Your assessor will confirm the finer details of how to film if this is your chosen method. • Observe you carrying out your Customer Service Practitioner role and duties in your workplace. • Complete the checklist and grading. • Confirm your results. • The observation will last for a minimum of one hour. This may not be a continuous observation but a succession of observations making up the minimum observation time. This may be completed on one, or more than one, occasion. 	
KEY POINT	<p><i>*If the assessor observes you dealing with a conflict or challenge or using your influencing skills to sell or offer a product or service to a customer, he/she will complete additional observation checklists. This may exempt you from completing the case studies within your apprentice showcase.</i></p>

Prior to the observation	
You must:	
<ul style="list-style-type: none"> • Prepare to be observed carrying out your normal roles and duties. • Read through the observation checklist to ensure that you understand what the observation entails and be aware of the standard you are being assessed against. This is included in this guidance document. • Contact the assessor with any questions prior to your assessment. 	

Interpersonal skills

During the observation the you must show his/her interpersonal skills by:

- Demonstrating effective interpersonal skills that achieve positive customer engagement, including effective use of:
 - Open and closed questioning skills that are relevant to the situation.
 - Active listening skills when communicating.
 - Body language when interacting with customers.
- Working with others and sharing good practice when performing your duties.

Pass	Distinction
To achieve a Pass you must demonstrate a willingness and ability to engage with customers in a positive manner using the relevant interpersonal skills.	To achieve a Distinction you must demonstrate the 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).
<ul style="list-style-type: none"> • Recognising customer needs and expectations. • Responding to customer needs and managing expectations in a professional and timely manner. 	
Pass	Distinction
To achieve a Pass you must work with customers to build a rapport, recognising and, where possible, meeting their needs and expectations.	To achieve a Distinction you must demonstrate the ability to balance the needs and expectations of the customer with those of the organisation.
<ul style="list-style-type: none"> • Building and maintaining a rapport with customers. 	
Pass	Distinction
To achieve a Pass you must demonstrate a willingness to work with others and share ideas where appropriate.	To achieve a Distinction you must proactively work with others to ensure efficient customer service delivery.

Communication

During the observation the apprentice must show his/her communication skills by:



KEY
POINT

Meeting all of the communication criteria with face-to-face and non-facing customers (for example, over the phone).

- Using the appropriate methods of verbal and non-verbal communication skills that are relevant to his/her work environment.

Pass	Distinction
To achieve a Pass you must demonstrate the ability to make initial face-to-face customer contact using the appropriate verbal and non-verbal communication skills.	To achieve a Distinction you must demonstrate the ability to adapt your 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.

<ul style="list-style-type: none"> Using the appropriate body language to maintain or enhance the customer experience. 	
Pass	Distinction
To achieve a Pass you must demonstrate the ability to adapt your tone, behaviour and body language when necessary, recognising and confirming an understanding of your customers' needs and expectations.	To achieve a Distinction you must demonstrate the ability to adapt your 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.
<ul style="list-style-type: none"> Adapting your tone and/or behaviour to maintain or enhance the customer experience as appropriate. 	
Pass criteria	Distinction criteria
To achieve a Pass you must demonstrate the ability to recognise when to summarise and which techniques to use..	To achieve a Distinction you must demonstrate the ability to adapt your 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.
<ul style="list-style-type: none"> Confirming your own, and the customer's, understanding of the customer's needs and expectations. 	
Pass criteria	Distinction criteria
To achieve a Pass you must demonstrate the ability to make initial non-facing customer contact and make use of the appropriate communication skills.	To achieve a Distinction you must demonstrate the ability to adapt to various customer personalities, while remaining calm and in control where necessary. You must also demonstrate that you know the organisational procedures to be followed in all communication and the importance to the brand/ organisation of this requirement.
<ul style="list-style-type: none"> Using summarising language and/or reinforcement techniques during customer interaction to confirm understanding. 	
Pass	Distinction
To achieve a Pass you must adapt your tone and behaviour when necessary, recognising and confirming an understanding of the customer's needs and expectations.	To achieve a Distinction you must demonstrate the ability to adapt to various customer personalities, while remaining calm and in control where necessary. You must also demonstrate that you know the organisational procedures to be followed in all communication and the importance to the brand/ organisation of this requirement.
<ul style="list-style-type: none"> Using correct, appropriate and clear communication skills, for example, written and verbal, which reflect the organisation's brand. 	
Pass	Distinction
To achieve a Pass you must demonstrate the ability to recognise and use reinforcement techniques during customer interactions.	To achieve a Distinction you must demonstrate the ability to adapt to various customer personalities, while remaining calm and in control where necessary. You must also demonstrate that you know the organisational procedures to be followed in all communication and the importance to the brand/ organisation of this requirement.
<p>To achieve a Distinction for the observation the apprentice will need to meet all of the Pass criteria and a minimum of 4 out of 5 of the Distinction criteria.</p>	

Customer Service Practitioner observation

Apprentice name:	Assessor name:	Date/s:
Details of observation/s:		
<p>Key: Passed – mark a tick (✓). Not passed – mark a cross (X). Passed with a comment – mark a bullet point (•). Question – mark a Q.</p> <p>Apprentices must achieve all criteria to pass this assessment.</p> <p>Apprentices can achieve a Distinction by meeting all of the Pass criteria (A & B) and a minimum of 4 out of 5 of the Distinction criteria (C).</p> <p>Customer service experience (A) – The apprentice has:</p> <p>✓ / X</p> <ol style="list-style-type: none"> Presented a tidy and professional image in line with the organisational dress code. Been approachable and welcoming when dealing with customers face-to-face in line with the organisational code of conduct. Confidently approached customers in a positive and professional manner following organisational procedures, even when circumstances are challenging. Confirmed his/her own, and the customer's, understanding of the customer's needs and expectations. Managed the customer's expectations. Worked towards meeting customer needs where possible, explaining when necessary when they cannot be met. Remained positive and professional when explaining when customer needs and/or expectations cannot be met. Used knowledge of organisational products/services and application of the organisation's policies and procedures. Checked customer satisfaction. Taken responsibility and worked with customers to achieve a positive outcome. Referred customers to others as required, accurately passing on the necessary information. Followed up as required to ensure that a positive outcome is reached. Maintained contact with customers where necessary and as promised (even if no additional information is available). Recognised and responded to individual needs to provide a personalised customer service experience. <p>Interpersonal and communication skills (B) – The apprentice has:</p> <p>✓ / X</p> <ol style="list-style-type: none"> Used effective open and closed questioning skills that are relevant to the situation. Used summarising language and/or reinforcement techniques during customer interactions to confirm understanding. Used effective active listening skills when communicating. Used effective body language when interacting with customers. Adapted tone and behaviour to meet customer needs and expectations. 		

20. Built and maintained a rapport with customers.	
21. Worked with others and shared good practice when performing his/her duties.	
22. Used a welcoming and approachable tone when in non-face-to-face situations to make initial customer contact (e.g. telephone, in writing) and made use of the appropriate communication skills.	
23. Used effective interpersonal skills that have achieved positive customer engagement.	
24. Used correct, appropriate and clear communication skills, for example, written and verbal, which reflect their organisation's brand.	
25. Maintained professional and positive language consistently in all customer interactions.	
26. Presented a positive attitude with all customers and in various situations.	
27. Treated all customers equally, ensuring that they comply with the legal requirements.	
28. Acted in a way that upholds the core values and service culture of the organisation.	
Distinction criteria (C) – The apprentice has:	✓ / X
1. Demonstrated the ability to balance the needs and expectations of the customer with those of the organisation.	
2. Demonstrated the 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).	
3. Demonstrated the 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.	
4. Demonstrated the ability to adapt to various customer personalities, while remaining calm and in control where necessary, in addition to demonstrating that he/she knows the organisational procedures to be followed in all communication and the importance to the brand/organisation of this requirement.	
5. Proactively worked with others to ensure efficient customer service delivery.	
Customer Service Practitioner professional observation – Result	Yes/No
All Pass criteria achieved	
All Pass criteria achieved, plus 4 out of 5 Distinction criteria achieved	

Assessor's feedback:

Customer Service Practitioner showcase – apprentice guidance

Part 2

This is the second part of your end-point assessment.

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Apprentice showcase overview

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Supporting testimony

Apprentice – line-manager testimony guidance

Line-manager testimony

Customer Service Practitioner showcase – apprentice guidance

Apprentice showcase overview



This is the second part of your end-point assessment.

The apprentice showcase will assess your knowledge.

The apprentice showcase will enable you to reflect and present examples of your development over the whole on-programme period – your apprentice journey.

Your employer and/or training provider will support you in selecting the appropriate evidence from your on-programme portfolio to demonstrate the minimum requirements of the standard.

Your evidence will be showcased through the completion of:

- A worksheet.
- Delivery of a presentation or induction pack.
- Personal development plan.
- Two customer service case studies (conflict and challenge and influencing skills).*
- A line-manager testimony.

This apprentice showcase forms part of the assessment for the following standards (see **Appendix A and C** for further details of the standards covered):

- Understanding the organisation.
- Meeting regulations and legislation.
- Systems and resources.
- Product and service knowledge.
- Developing self.
- Being open to feedback.
- Dealing with customer challenge and conflict.
- Influencing skills.
- Personal organisation.
- Team-working.

**Conflict and challenge and influencing skills case-study exemptions*

Your assessor may have observed you dealing with a conflict or a challenging customer during your workplace observation or he/she may have observed you using your influencing skills to sell or offer a product or service to a customer. This evidence can be used to exempt you from either one or both case studies. Your assessor will inform you as to whether or not you need to complete the case studies after he/she has observed you in the workplace.

Your independent assessor will:

- Confirm the details of the apprentice showcase assessment with you to ensure that you completely understand the process of assessment and what is expected of you.
- Confirm with your employer the requirements of the apprentice showcase.
- Confirm the format of the different elements of your apprentice showcase assessment with you.
- Agree a plan with you.
- Set separate tasks to enable you to complete all aspects of the apprentice showcase.
- Confirm how he/she wants you to submit your evidence as part of the apprentice showcase, for example, electronically or by post.
- Complete the checklist and grading and confirm your results.

Worksheet guidance:

You must

- Read through the worksheet questions to ensure that you understand all of the questions.
- Contact the assessor with any questions prior to your assessment.

During completion of the worksheet you must:

- Answer each question in full, giving as much detail as possible, with examples to illustrate your answers where applicable.

Pass

To achieve a Pass you must explain the following in sufficient detail to demonstrate your knowledge of:

- The difference between public-, private- and third-sector organisations. You must demonstrate your understanding of each type of organisation and the main differences between them.
- The term 'brand promise'. You must define this term and show that you understand what your organisation's 'brand promise' is.
- The term 'core values'. You must define this term and show that you understand what your organisation's 'core values' are.
- The term 'service culture'. You must define this term and show that you understand what your organisation's 'service culture' is.
- The purpose of an organisational policy. You must demonstrate your understanding of organisational policy and its purpose.
- The contents of a complaints process/procedure. You must demonstrate your understanding of the purpose of a complaints process/procedure and what aspects should be included.
- The term 'digital media'. You must define this term and demonstrate your understanding of the purpose and uses of 'digital media'.
- The different types of measurement used to monitor customer service levels. You must demonstrate your understanding of a variety of different ways to measure customer service levels and give details of at least two different types.
- The different types of evaluation tool used to monitor customer service levels. You must demonstrate your understanding of a variety of different evaluation tools and give details of at least two different ones.
- The difference between providing a product and providing a service. You must demonstrate your understanding of what a product is and what a service is, giving an example of each.
- The difference between informal and formal feedback. You must demonstrate your understanding of how to obtain both types of feedback from others, giving an example of each.

Distinction

To achieve a Distinction you must explain the following in sufficient detail to demonstrate your knowledge of:

- The impact of organisational policies and procedures. You must demonstrate your understanding of how the organisation's policies and procedures impact the delivery of customer service.
- How a code of practice or ethical standards affect customer service. You must demonstrate your understanding of the value of codes of practice and ethical standards to an organisation and how they might impact customer service.
- The importance of updating your knowledge of your organisation's products and/or services. You must demonstrate your understanding of the value to your organisation of updating your knowledge.

To achieve a **Distinction** for the worksheet you will need to meet all of the Pass criteria and all of the **Distinction** criteria (**3** out of **3**).

Customer Service Practitioner worksheet

Apprentice name:	Assessor name:	Date:
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Apprentice guidance

- You must answer all questions in sufficient detail to meet the Pass and **Distinction** criteria for this assessment.
- You can achieve a **Distinction** by meeting all of the Pass criteria and **3** out of **3** of the criteria in bold text.

1. What are skills and behaviours? Consider the similarities and differences in your answer.

Public:
Private:
Third sector:

2. What are skills and behaviours? Consider the similarities and differences in your answer.

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3. What is meant by an organisation's core values?

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4. What is meant by service culture?

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5. What is the purpose of an organisational policy?

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6. How do organisational policies and procedures impact the delivery of customer service?

7. What should be included in a complaints process/procedure?

8. What is meant by digital media?

9. How do a code of practice or ethical standards affect customer service?

10. What different types of measurement are used to monitor customer service levels? Detail at least two different types of measurement.

11. What different types of evaluation tool can be used to monitor customer service levels? Detail at least two different tools.

12. What is the difference between providing a product and providing a service? Give an example of each.

13. Why is it important to update your knowledge of your organisation's products and/or services?

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14. Describe how to obtain informal and formal feedback from others. Give two examples of each.

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Customer Service Practitioner Apprentice Showcase Worksheet - Grading

Apprentices must competently answer all questions to meet the pass criteria for this assessment	
Apprentices can achieve a distinction by meeting all pass criteria and 3 out of 3 of the criteria in bold text	
Did the apprentice:	✓ / X
1. Explain the difference between public, private and third sector organisations?	
2. Define 'brand promise'?	
3. Explain what is meant by an organisations core values?	
4. Define service culture?	
5. Explain the purpose of an organisational policy?	
6. Explain how organisational policies and procedures impact on the delivery of customer service?	
7. Explain what should be included in a complaints process/procedure?	
8. Explain what is meant by digital media?	
9. Explain how a code of practice or ethical standards affects customer service?	
10. Explain the different types of measurement that can be used to monitor customer service levels, giving two examples?	
11. Explain the different types of evaluation tool that can be used to monitor customer service levels, giving two examples?	
12. Explain the difference between providing a product and providing a service, giving an example of each?	
13. Explain the importance of updating their knowledge of the organisation's products and/or services?	
14. Identify suitable ways of obtaining informal and formal feedback from others, giving two examples of each?	

Customer service practitioner apprentice showcase worksheet – Result	Yes/No
All Pass criteria achieved	
All pass criteria achieved, plus 3 out of 3 distinction criteria achieved	

Assessor's feedback:

Presentation or induction pack for a new employee guidance

Presentation or induction pack for a new employee guidance	
You must	
<ul style="list-style-type: none"> • Read through the guidance to ensure that you understand all of the requirements for this element of the apprentice showcase assessment. • Liaise with your manager to see what format would suit the organisation. • Contact the assessor with any questions prior to your assessment. • Put together a presentation or an induction pack for a new employee within your organisation using the following guidance. • Base the presentation or induction pack on your own job role. • Use the checklist within this guidance to ensure that you have included everything. 	
 KEY POINT	<p>The presentation or induction pack can be in any format you choose, for example, a PowerPoint presentation that could be delivered to a new employee in a formal or informal setting, an induction pack comprising information or a series of documents that a new employee could access. You may choose to deliver the presentation to a new employee, your manager or team. If the last scenario is used, this must be recorded/filmed and made available to your assessor.</p>
During completion of the presentation or induction pack for a new employee you must include the following:	
<ul style="list-style-type: none"> • An overview of your organisation, to include: <ul style="list-style-type: none"> • The purpose of the organisation. • The type of business (e.g. public, private, third sector). • The aims of the organisation. • The 'brand promise' of the organisation. • The core values of the organisation. • The customer service culture of the organisation (including the relationship between the core values and the service culture). • Policies and procedures, to include: <ul style="list-style-type: none"> • A list of the organisational policies and procedures that are relevant to the customer service role, including explanations of: <ul style="list-style-type: none"> • The complaints process/procedure. • The digital media policy/rules that affect the use of social and digital media in the organisation. • Any other relevant customer service policy/procedure. • Legislation and regulation, to include: <ul style="list-style-type: none"> • The legislation and regulation that affects the organisation (including the potential impact on the organisation if it fails to adhere to each of the relevant pieces of legislation and regulations). • Confidentiality within the organisation, including: <ul style="list-style-type: none"> • Your responsibilities for confidentiality. • Why confidentiality is important. • The types of information that need to be kept confidential in the organisation. 	

- Health and Safety at Work Act, including:
 - The responsibilities of the employee.
 - The responsibilities of the employer.

- Systems, equipment and technology, to include:
 - An overview of how the different systems, equipment and/or technology in the organisation are used to meet the needs of customers effectively.
 - An overview of the specific ones used in your customer service role.
 - The measures and evaluation tools used in the organisation to monitor customer service levels.
- Products and services, to include:
 - A list of the organisation's products and services.
 - An overview showing the different features and benefits of the products and/or services in the organisation.
 - The process for keeping up-to-date and maintaining knowledge of new products/services.

Pass

To achieve a Pass you must include the following in sufficient detail:

- The aims of your organisation in relation to its sector.
- The 'brand promise' of your organisation.
- The relationship between your organisation's core values and its service culture.
- A list of the different organisational policies and procedures that affect your customer service role and their purpose.
- An explanation of the digital media policy/rules that affect the use of social and digital media in your organisation.
- An explanation of how legislation and regulations affect your organisation's customer service provision.
- An explanation of the responsibilities of your organisation's employees under the Health and Safety at Work Act.
- An explanation of the responsibilities of your employer under the Health and Safety at Work Act.
- An overview of how different systems, equipment and/or technology are used in your organisation to meet customer needs effectively.
- An explanation of the measures and evaluation tools used in your organisation to monitor customer service levels.
- An overview showing the different features and benefits of the products and/or services in your organisation.

Distinction

To achieve a **Distinction** you must explain the following in sufficient detail:

- An explanation of the potential impact on the organisation if it fails to adhere to the relevant legislation and regulations?

To achieve a **Distinction** for the presentation or induction pack you will need to meet all of the Pass criteria and the one **Distinction** criterion (**1** out of **1**).

Customer Service Practitioner presentation/induction pack – apprentice checklist

Please use this document to check that you have included everything in your presentation or induction pack.

Details of the type of evidence, that is, the presentation details or format of the induction pack.
--

Contents of presentation/induction pack	Yes/No
An overview of your organisation, to include:	
The purpose of the organisation.	
The type of business (e.g. public, private, third sector).	
The aims of the organisation.	
The 'brand promise' of the organisation.	
The core values of the organisation.	
The customer service culture of the organisation.	
The relationship between the core values and the service culture.	
Policies and procedures, to include:	
A list of the organisational policies and procedures that are relevant to the customer service role, including explanations of:	
• The complaints process/procedure.	
• The digital media policy/rules that affect the use of social and digital media in the organisation.	
• Any other relevant customer service policy/procedure.	
Legislation and regulations, to include:	
The legislation and regulations that affect the organisation.	
The potential impact on the organisation if it fails to adhere to each of the relevant pieces of legislation and regulations.	
Confidentiality within the organisation, including:	
• Your responsibilities for confidentiality.	
• Why confidentiality is important.	
• The types of information that need to be kept confidential in the organisation.	
Health and Safety at Work Act, including:	
• The responsibilities of the employee.	
• The responsibilities of the employer.	
Systems, equipment and technology, to include:	
• An overview of how the different systems, equipment and/or technology in the organisation are used to meet the needs of customers effectively.	
• An overview of the specific ones used in your customer service role.	
• The measures and evaluation tools used in the organisation to monitor customer service levels.	
Products and services, to include:	
• A list of the organisation's products and services.	
• An overview showing the different features and benefits of the products and/or services in the organisation.	
• The process for keeping up-to-date and maintaining knowledge of new products/services.	

Presentation or Induction Pack for a New Employee - Grading

Apprentices must achieve the criteria in the shaded boxes to pass this assessment	
Apprentices can achieve a distinction by meeting all pass criteria and 1 out of 1 of the criteria in bold text	
Within the presentation or induction pack, did the apprentice include:	✓ / X
1. Their organisation business type and purpose?	
2. The aims of the organisation in relation to its sector?	
3. The 'brand promise' of the organisation?	
4. The core values of the organisation?	
5. The customer service culture of the organisation?	
6. The relationship between the organisation's core values and its service culture?	
7. A list of the different organisational policies and procedures that affect their customer service role and their purpose?	
8. An explanation of the digital media policy/rules that affect the use of social and digital media in the organisation?	
9. An explanation of how legislation and regulations affect the organisation's customer service provision?	
10. The information that needs to be kept and remain confidential within the organisation and why this is important?	
11. An explanation of their responsibilities for keeping information confidential in the organisation?	
12. An explanation of the responsibilities of the employees under the Health and Safety at Work Act?	
13. An explanation of the responsibilities of the employers under the Health and Safety at Work Act?	
14. An explanation of the potential impact on the organisation if it fails to adhere to relevant legislation and regulations?	
15. An overview of how different systems, equipment and/or technology are used in the organisation to meet customer needs effectively?	
16. An explanation of the specific systems, equipment and/or technology they use to support customer needs?	
17. An explanation of the measures and evaluation tools used in the organisation to monitor customer service levels?	
18. A list of the organisations products and/or services?	
19. An overview showing the different features and benefits of the products and/or services in the organisation?	
20. The process for keeping up-to-date and maintaining knowledge of the organisations products and/or services?	

Presentation or induction pack for a new employee – Result	Yes/No
All Pass criteria achieved	
All pass criteria achieved, plus 1 out of 1 distinction criteria achieved	

Description of the Presentation or Induction Pack for a New Employee (Please give details of the format of the task and what evidence was presented by the apprentice):

Assessor's feedback:

Personal development plan guidance

Personal development plan guidance
You must <ul style="list-style-type: none"> Read through the four sections of the personal development plan to ensure that you understand all of the sections/questions. Contact the assessor with any questions prior to your assessment.
During completion of the personal development plan you must include the following: <ul style="list-style-type: none"> Section 1: Self-assessment. You will need to rate how confident you feel about your current skills and highlight any skills you feel you need for the future. Section 2: SWOT. You will need to complete a SWOT analysis to highlight areas where you are strong and areas where you are weaker. You will also need to highlight any opportunities you might have and if you foresee any threats. Section 3: Development plan. Based on your findings from sections 1 and 2, you will need to complete a personal development plan. Your goals must be SMART (specific, measurable, achievable/agreed, realistic and time-bound) and include short-, medium- and long-term goals. You will need to highlight any challenges you foresee and how you will overcome these. Section 4: You will need to gain feedback from a manager or work colleague on your self-assessment, SWOT analysis and personal development plan. You will also need to reflect on the feedback and record any actions you will take as a result of the feedback.
Pass <p>To achieve a Pass you must complete the following in sufficient detail to demonstrate your knowledge:</p> <ul style="list-style-type: none"> Conduct a self-assessment to identify your strengths and weaknesses in relation to your job role. Produce a personal development plan to support the achievement of your agreed learning and development goals. Seek constructive feedback about your customer service skills and knowledge from others. Use feedback from others to develop your customer service skills and knowledge.
Distinction <p>To achieve a Distinction you must complete the following in sufficient detail:</p> <ul style="list-style-type: none"> Review the effectiveness of your personal development plan and update it accordingly. <p>To achieve a Distinction for the personal development plan you will need to meet all of the Pass criteria and the one Distinction criterion (1 out of 1).</p>

Personal development plan

Apprentice name:		Assessor name:		Date:	
Self-assessment					
Below is a selection of skills that are needed in order to work in most work environments. Against each skill, rate how confident you feel about your current skills. In the blank section underneath, highlight any additional skills that you feel you need. Review and update as a result of achievements.					
Skills		Rate your confidence in this area (Please tick ✓)			
		Very confident	Quite confident	Not confident	
Communication – verbal and listening skills (dealing with customers/colleagues by telephone, electronically or face-to-face).					
Problem-solving (handling and resolving customer complaints and work-based issues).					
Managing administration (paperwork and filing skills).					
Time-management (managing time, planning, being effective, efficient, productive and reliable).					
Developing positive working relationships (social skills, the ability to interact with others).					
Having compassion and care for others.					
Attitude (having the right attitude towards work and the organisation you work for).					
Aptitude for learning and development.					
Literacy skills (reading, writing, vocabulary, spelling and comprehension).					
Numeracy (understanding numerical data, statistics and graphs, making decisions and reasoning).					
IT skills.					
Product and service knowledge (taking ownership for keeping knowledge up-to-date)					


Add in your own skills list below	Rate your confidence in this area (Please tick ✓)		
	Very confident	Quite confident	Not confident

Considering the findings from the self-assessment, complete the SWOT analysis below.

SWOT analysis	
Strengths	Weaknesses
Opportunities	Threats

As a result of the SWOT analysis, create some realistic goals for your personal development and complete the plan below. Goals may be formal or informal, for example, training, research, guidance or support. Ensure that the goals are SMART.

Goals – areas where I need to develop	Actions I need to take to achieve this	Who do I need to help me with this?	Review date	Progress update

Feedback from others			
<div>  KEY POINT </div> <p>It is important to gain feedback from others on your knowledge and skills. Discuss your self-assessment, SWOT analysis and personal development plan with your manager or a work colleague. Do they agree with how you have scored yourself? What do they think your main strengths are and which areas do they think you need to develop?</p>			
Who did you have the discussion with? (Include name and job title and ask him/her to sign and date below.)			
Name:	Signature:	Job title:	Working relationship with apprentice: Date:
Record your discussion below:			
<div> Reflection: How do you feel about the feedback you received? How will you use the feedback you received to maintain and develop your customer service knowledge and skills? </div>			


Personal development plan - Grading

Apprentices must achieve the criteria in the shaded boxes to pass this assessment	
Apprentices can achieve a distinction by meeting all pass criteria and 1 out of 1 of the criteria in bold text	
Within the personal development plan, did the apprentice:	✓ / X
1. Conduct a self-assessment to identify their strengths and weaknesses in relation to the job role?	
2. Apply the techniques of self-assessment to look at strengths and weaknesses?	
3. Identify their own strengths and weaknesses in relation to working within a customer service role?	
4. Produce a personal development plan to support the achievement of their agreed learning and development goals?	
5. Consider personal goals and propose development that would help achieve them?	
6. Review the effectiveness of their personal development plan and update it accordingly?	
7. Identify suitable ways of obtaining informal and formal feedback from others?	
8. Seek constructive feedback about their customer service skills and knowledge from others?	
9. Positively respond to all feedback?	
10. Use feedback from others to develop their customer service skills and knowledge?	


Personal development plan – Result	Yes/No
All Pass criteria achieved	
All pass criteria achieved, plus 1 out of 1 distinction criteria achieved	

Assessor's feedback:

Conflict and challenge case-study guidance

Conflict and challenge case-study guidance	
You must	
<ul style="list-style-type: none"> Read through the guidance to ensure that you understand how to complete the case study. Contact the assessor with any questions prior to your assessment. 	
During completion of the conflict and challenge case study you must include the following:	
<ul style="list-style-type: none"> A written case study detailing how you have dealt with a challenging customer* situation. You can support the case study with any additional documents, such as a testimony from a work colleague or even feedback from the customer.* You can include supporting evidence, such as email communication, feedback forms, comment cards or customer or witness testimonies (see template after case-study guidance). A handwritten or electronically produced case study. An overview of the challenging situation that you experienced. An explanation of the steps that you took to support the customer. An overview of your approach, attitude and demeanour during the conflict. A description of the communication skills you used with the customer. An overview of the possible resolutions for the situation. A description of the resolution you implemented. How you followed organisation policies and procedures. Any sign-posting or referral to others. How you kept the customer informed of the progress of the resolution to the issue. What records you kept detailing the situation and the steps you took to progress the issue to resolution. A reflective overview of how you felt you dealt with the situation – what you learnt from the situation, what went well and what you could do better next time. 	
 KEY POINT	*Please ensure that real customer names are not used or are deleted/blanked out from any supporting evidence.
Pass	
<p>To achieve a Pass you must show how you achieved the following to demonstrate your knowledge and skills when dealing with challenge and conflict:</p> <ul style="list-style-type: none"> Showed patience, calmness and empathy when dealing with a challenging customer situation. Demonstrated sensitivity to, and interest in, the customers' concerns. Communicated in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers. Resolved customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures. Kept customers informed of progress while resolving issues. Maintained accurate records of customer issues and progress to resolution. 	
Distinction	
<p>To achieve a Distinction you must show how you achieved the following to demonstrate your knowledge and skills when dealing with challenge and conflict:</p> <ul style="list-style-type: none"> Took ownership of customer issues, taking the appropriate actions to ensure that customers' needs and expectations were met. 	
<p>To achieve a Distinction for the conflict and challenge case study you will need to meet all of the Pass criteria and the one Distinction criterion (1 out of 1).</p>	

Influencing skills case-study guidance

Influencing skills case-study guidance	
You must	
<ul style="list-style-type: none"> Read through the guidance to ensure that you understand how to complete the case study. Contact the assessor with any questions prior to your assessment. 	
During completion of the influencing skills case study you must include the following:	
<ul style="list-style-type: none"> A written case study detailing how you have influenced a customer to purchase a product or service, or how you have encouraged a customer to try out a new product or service suited to his/her needs. You can support the case study with any additional documents, such as a testimony from a work colleague or even feedback from the customer. You can include supporting evidence, such as email communication, feedback forms, comment cards or customer or witness testimonies (see template after case-study guidance). A handwritten or electronically produced case study. An overview of the circumstances where you were able to influence a customer. An explanation of the steps that you took to influence the customer. A justification as to why the product or service was appropriate to the customer's needs. An overview of the benefits to the customer and to the organisation of selling or providing the product or service. An overview of your approach, attitude and demeanour during the conversation. A description of the communication skills you used with the customer. How you explained the benefits of the product or service to the customer. An overview of any alternative options for the customer. How you handled any objections from the customer. How you provided the appropriate explanations to the customer where a mutually beneficial outcome could not be reached. A reflective overview of your influencing skills – what you learnt from the situation, what went well and what you could do better next time. 	
 KEY POINT	*Please ensure that real customer names are not used or are deleted/blanked out from any supporting evidence.
Pass	
<p>To achieve a Pass you must show how you achieved the following to demonstrate your knowledge and skills when influencing customers:</p> <ul style="list-style-type: none"> Offered the appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation. Communicated to customers in a clear and coherent manner how the products and/or services offered met their needs. Handled customer objections in a positive and professional manner. 	
Distinction	
<p>To achieve a Distinction you must show how you achieved the following to demonstrate your knowledge and skills when influencing customers:</p> <ul style="list-style-type: none"> Provided the appropriate explanations to customers in situations where a mutually beneficial outcome could not be reached. 	
<p>To achieve a Distinction for the influencing skills case study you will need to meet all of the Pass criteria and the one Distinction criterion (1 out of 1).</p>	

Supporting testimony

This testimony can be used to support your written evidence for your case studies. This can be used for testimonies from customers, work colleagues or line managers.

Apprentice name:	
Who is the testimony from?	Date:
Please complete the following testimony in as much detail as possible, giving examples to illustrate your answers.	
Please comment on the ability of the apprentice to do the following with regards to dealing with a customer conflict or challenge: An overview of the apprentice's approach, attitude and demeanour during the conflict or challenge.	
Any other comments that you feel are appropriate.	

Line-manager testimony guidance

Line-manager testimony guidance
<p>You must</p> <ul style="list-style-type: none"> • Read through the guidance to ensure that you understand what the line-manager testimony needs to include. • Contact the assessor with any questions prior to your assessment. • Speak to your line manager to explain that he/she will need to provide a testimony based on your personal organisation and team-working skills. • Arrange with your assessor how he/she would like to receive the information. You may need to ask your line manager to complete the testimony, or your assessor may arrange to interview your line manager over the telephone at a mutually convenient time or email a testimony to your manager to complete. • Support the testimony with copies of relevant appraisals or one-to-ones with your manager where you have discussed your personal progress in your role.
<p>Your line manager will need to comment on the following:</p> <ul style="list-style-type: none"> • Personal organisation. Your ability to: <ul style="list-style-type: none"> • Organise yourself, prioritise your own workload/activity and work to meet deadlines. • Agree goals and deadlines for completing tasks with an appropriate person. • Prioritise and plan the completion of tasks according to the agreed deadlines. • Use the appropriate tools and techniques to monitor the progress of tasks and their completion. • Monitor and adjust priorities as required. • Meet the agreed deadlines. • Respond in a professional manner to challenges and changes and adjust priorities accordingly. • Team-working skills. Your ability to: <ul style="list-style-type: none"> • Demonstrate the interpersonal skills required to work effectively as part of a team. • Communicate consistently with team members in the interest of helping customers. • Demonstrate cooperation when working with others. • Work with others in a positive and productive manner. • Recognise when to adapt your personal behaviours and communication approaches to meet the needs of team members and customers. • Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently. • Share personal learning and information with others to support good customer service practice. • Present reasoned ideas for improving customer service practice to the appropriate colleagues.
<p>Pass</p> <p>To achieve a Pass the testimony must show how you achieved the following to demonstrate your knowledge and skills:</p> <ul style="list-style-type: none"> • Prioritised and planned the completion of tasks according to the agreed deadlines. • Used the appropriate tools and techniques to monitor the progress of tasks and their completion. • Worked with others in a positive and productive manner. • Communicated information in a timely and reliable manner to team members to support them in meeting customer needs efficiently. • Shared personal learning and information with others to support good customer service practice.

Distinction

To achieve a **Distinction** the testimony must show how you achieved the following to demonstrate your knowledge and skills:

- Responded in a professional manner to challenges and changes and adjusted priorities accordingly.
- Recognised when to adapt personal behaviours and communication approaches to meet the needs of team members and customers.
- Presented reasoned ideas for improving customer service practice to the appropriate colleagues.

To achieve a **Distinction** for the line-manager testimony it will need to meet all of the Pass criteria and all of the **Distinction** criteria (**3** out of **3**).

Line-manager testimony

You will need to ask your line manager to complete the following testimony based on your personal organisation and team-working skills.

Please support the testimony with copies of the relevant appraisals or one-to-ones with your manager where you have discussed your personal progress in your role.

Apprentice name:	
Manager name:	Manager signature:
Manager's job title:	Date:
Assessor to complete – supporting evidence presented:	
<p>Please complete the following testimony in as much detail as possible, giving examples to illustrate your answers.</p>	
<p>Please comment on the ability of the apprentice to competently do the following with regards to his/her personal organisation. Please give examples where appropriate:</p>	
Organise him/herself, prioritise his/her own workload/activity and work to meet deadlines?	
Agree goals and deadlines for completing tasks with an appropriate person?	
Prioritise and plan the completion of tasks according to the agreed deadlines?	
Use the appropriate tools and techniques to monitor the progress of tasks and their completion?	
Monitor and adjust priorities as required?	
Meet the agreed deadlines?	
Respond in a professional manner to challenges and changes and adjust priorities accordingly?	

Please comment on the ability of the apprentice to competently do the following with regards to his/her team-working skills:

Demonstrate the interpersonal skills required to work effectively as part of a team?

Communicate consistently with team members in the interest of helping customers?

Demonstrate cooperation when working with others?

Work with others in a positive and productive manner?

Recognise when to adapt personal behaviours and communication approaches to meet the needs of team members and customers?

Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently?

Share personal learning and information with others to support good customer service practice?

Present reasoned ideas for improving customer service practice to the appropriate colleagues?

Customer Service Practitioner professional discussion – apprentice guidance

Part 3

This is the third part of your end-point assessment.

Contents

The professional discussion will assess your behaviours and attitudes

What is a professional discussion?

Customer Service Practitioner professional discussion – apprentice notes

Customer Service Practitioner professional discussion checklist and grading
record

Final grading

Customer Service Practitioner professional discussion – apprentice guidance



KEY
POINT

This is the third part of your end-point assessment.

The professional discussion will assess your behaviours and attitudes.

What is a professional discussion?

The professional discussion is a structured discussion between you and the **Active IQ** independent assessor. The professional discussion will always take place after you have been observed in the workplace, to establish your understanding and application of knowledge, skills, behaviours and attitudes.

The professional discussion gives you an opportunity to talk through, demonstrate, show and clarify aspects of your work that still need evidencing after your observation and apprentice showcase are complete.

Your assessor will plan your professional discussion to obtain the clarification needed. The plan will be discussed with you and you will need to agree to it.

The professional discussion is different to questioning, as the conversation will be led by you, which differentiates it from questioning.

The professional discussions will be recorded. Your assessor will discuss with you the best way to do this. The following methods will be considered:

- 'Live' discussion in the workplace.
- Audiotape/dictaphone.
- Video.
- Skype call.
- Transcript of a telephone conversation.

The purpose of the professional discussion is to:

- Clarify any questions the **Active IQ** independent assessor has from his/her assessment of your apprentice journey (apprentice showcase) and practical observation.
- Confirm and validate judgements about the quality of your work.
- Explore aspects of your work, including how it was carried out, in more detail.
- Discuss how you would behave in specific scenarios, if they have not occurred within the practical observation.
- Ask questions in relation to your personal development and reflection.
- Provide a basis for the **Active IQ** independent assessor to make a decision about the grade to be awarded.

This professional discussion forms part of the assessment for the following standards (see **Appendix A and D** for further details of the standards covered):

- Role and responsibility.
- Knowing your customers.
- Customer experience.

Your independent assessor will:

- Confirm the details of the professional discussion assessment with you to ensure that you completely understand the process of assessment and what is expected of you.
- Confirm with your employer the requirements of the planned professional discussion.
- Confirm the format of your professional discussion assessment with you.
- Carry out a professional discussion with you about your Customer Service Practitioner role and duties in your workplace.
- Complete the checklist and grading.
- Confirm your results.

The professional discussion will last for approximately one hour.

Prior to the professional discussion**You must:**

- Prepare for your professional discussion. You can write prompt notes for each of the 20 assessment criteria to support the discussion. Use the professional discussion notes section in this guidance document.
- Read through the professional discussion checklist to ensure that you understand what the assessment entails and be aware of the standard you are being assessed against. This is included in this guidance document.
- Contact the assessor with any questions prior to your assessment.

Role and responsibility**During the professional discussion you must meet all of the assessment criteria by:**

- Demonstrating knowledge of your roles and responsibilities in your Customer Service Practitioner role.

Pass

To achieve a Pass you must discuss the following areas in sufficient detail to demonstrate your knowledge of:


- Your job role. You must be able to clarify your job role, job description and role within your organisation, and why this is important to the success of the organisation.
- Your responsibilities within your job role. You must describe the different responsibilities within the job role and why these are important for the success of the organisation.
- The targets and goals you are set for work. You must be able to give details of measured targets or SMART goals you are set and how your manager monitors your progress to achieve these. You must also give details of how you go about achieving the goals and targets you are set for your work.
- How the work you do and your actions impact others in your organisation, namely, staff and customers.

Knowing your customers
During the professional discussion you must meet all of the assessment criteria by:
<ul style="list-style-type: none"> Demonstrating knowledge of the customers who use your organisation.
Pass
<p>To achieve a Pass you must discuss the following areas in sufficient detail to demonstrate your knowledge of:</p> <ul style="list-style-type: none"> The different customers who use your organisation. Who 'your' direct customers are. The difference between internal and external customer types. The internal and external customers who use your organisation. The purpose of customer service. How the standard of customer service within an organisation can affect its success. The meaning of 'customer expectations'. The differing needs and priorities of some of your customers. The customers who have needs that would be covered by the Equality Act (e.g. a child, a disabled person). You should also provide an example of when you have done this. How to adapt your approach for customers to enable you to meet their needs and expectations. You should also provide an example of when you have done this.
Distinction
<p>To achieve a Distinction you must be able to:</p> <ul style="list-style-type: none"> Explain the difference in the way internal and external customer relationships are managed in your organisation. Explain the importance of building good customer relationships within your organisation. Explain the importance of balancing the needs of the organisation with the needs of your customers and give an example to show how you have done this.
Customer experience
During the professional discussion you must meet all of the assessment criteria by:
<ul style="list-style-type: none"> Demonstrating knowledge of the importance of delivering a customer-focused experience.
Pass
<p>To achieve a Pass you must discuss the following areas in sufficient detail to demonstrate your knowledge of:</p> <ul style="list-style-type: none"> The meaning of 'a customer-focused experience'. How you have established facts to create a customer-focused experience. The importance of building a customer's trust. How you would start to build a customer's trust.
Distinction
<p>To achieve a Distinction you must be able to:</p> <ul style="list-style-type: none"> Explain how you respond to customer needs and requirements in a positive manner.
<p>To achieve a Distinction for the professional discussion you will need to meet all of the Pass criteria and a minimum of 3 out of 4 of the Distinction criteria.</p>

Customer Service Practitioner professional discussion – apprentice notes

Please use this document to record your notes in preparation for your professional discussion with your assessor.

Date:	Start time:
Details of how the professional discussion is to be carried out (e.g. in the workplace, via telephone, Skype):	

 KEY POINT		Distinction questions are in bold text (9, 10, 17, 19)
1	Tell me about your job role and your responsibilities.	
2	Tell me how the work you do impacts others in your organisation.	
3	Tell me about the targets and goals you are set for your work.	

4	How do you go about achieving these?
5	Tell me about the different customers who use your organisations.
6	Who are 'your' customers?
7	Can you tell me the difference between internal and external customers?
8	Tell me about the internal and external customers within your organisation.
9	What is the difference between how external and internal customer relationships are managed?

10	Why is it important to build good customer relationships within your organisation?
11	Tell me about the purpose of customer service.
12	How does the standard of customer service affect the success of your organisation?
13	Thinking about your customers, tell me about some of their differing needs and priorities.
14	Tell me about a time when you have had to assist a customer with a need that would be covered by the Equality Act.
15	Can you explain what is meant by customer expectations?

16	Can you give examples of when and how you have adapted your service approach to meet a customer's needs and expectations?
17	Can you explain the importance of balancing the needs of the organisation with the needs of your customers? Can you give an example of when you have had to do this?
18	What is your understanding of a customer-focused experience? Can you give an example of how you have achieved this (how did you establish the facts and use them to create a customer-focused experience?)?
19	Tell me how you respond to customer needs and requirements in a positive manner.
20	Tell me how you build trust with your customers. Why is this important?

Customer Service Practitioner professional discussion checklist and grading record

Apprentice name:	Assessor name:	Date/s:
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Key: Passed – mark a tick (✓). Not passed – mark a cross (X). Passed with a comment – mark a bullet point (•). Question – mark a Q.

Apprentices must achieve all criteria to pass this assessment.	✓ / X
Apprentices can achieve a Distinction by meeting all of the Pass criteria and a minimum of 3 out of 4 of the Distinction criteria.	
1. Tell me about your job role and your responsibilities.	
2. Tell me how the work you do impacts others in your organisation.	
3. Tell me about the targets and goals you are set for your work.	
4. How do you go about achieving these?	
5. Tell me about the different customers who use your organisation.	
6. Who are 'your' customers?	
7. Can you tell me the difference between internal and external customers?	
8. Tell me about the internal and external customers within your organisation.	
9. What is the difference between how external and internal customer relationships are managed?	
10. Why is it important to build good customer relationships within your organisation?	
11. Tell me about the purpose of customer service.	
12. How does the standard of customer service affect the success of your organisation?	
13. Thinking about your customers, tell me about some of their differing needs and priorities.	
14. Tell me about a time when you have had to assist a customer with a need that would be covered by the Equality Act.	
15. Can you explain what is meant by customer expectations?	
16. Can you give examples of when and how you have adapted your service approach to meet a customer's needs and expectations?	
17. Can you explain the importance of balancing the needs of the organisation with the needs of your customers? Can you give an example of when you have had to do this?	
18. What is your understanding of a customer-focused experience? Can you give an example of how you have achieved this (how did you establish the facts and use them to create a customer-focused experience?)?	
19. Tell me how you respond to customer needs and requirements in a positive manner.	
20. Tell me how you build trust with your customers. Why is this important?	

Customer Service Practitioner professional discussion – result	Yes/No
All Pass criteria achieved	
All Pass criteria achieved, plus 3 out of 4 Distinction criteria achieved	

Assessor's feedback:

Final grading

Apprentice name:	Workplace:	Manager name:
Assessor name:	Internal verifier name:	Date of final grading:

Pass - To achieve a **Pass** overall the apprentice must achieve all of the Pass assessment criteria as stipulated for each individual assessment.

Distinction - To achieve a **Distinction** overall the apprentice **must** have achieved a Pass overall and **must** gain a **Distinction** in each of the three elements of his/her end-point assessment. A **Distinction** must be achieved for the observation, the professional discussion and the overall apprentice showcase. The apprentice must meet all of the requirements for each individual assessment that makes up the apprentice showcase, as per the table below.

<p>Assessor's final summary:</p>

Assessment	All Pass criteria achieved? Yes/No	Distinction requirements met?	Yes/No
Observation			
Observation		A minimum of 4 out of 5 Distinction criteria?	
Apprentice showcase			
Worksheet		A minimum of 3 out of 3 Distinction criteria?	
Presentation/induction pack		A minimum of 1 out of 1 Distinction criteria?	
personal development plan		A minimum of 1 out of 1 Distinction criteria?	
Customer conflict case study		A minimum of 1 out of 1 Distinction criteria?	
Influencing skills case study		A minimum of 1 out of 1 Distinction criteria?	
Manager testimony		A minimum of 3 out of 3 Distinction criteria?	
Overall		7 out of 10 Distinction criteria?	
Professional discussion			
Professional discussion		A minimum of 3 out of 4 Distinction criteria?	

Final result summary			Yes/No/Grade
All Pass criteria achieved			
All Pass criteria achieved, plus:	Observation	4 out of 5 Distinction criteria achieved	
	Apprentice showcase	7 out of 10 Distinction criteria achieved	
	Professional discussion	3 out of 4 Distinction criteria achieved	
Grade	Please insert grade of Refer, Pass or Distinction in the box		

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