



# CUSTOMER SERVICE PRACTITIONER APPRENTICESHIP STANDARD

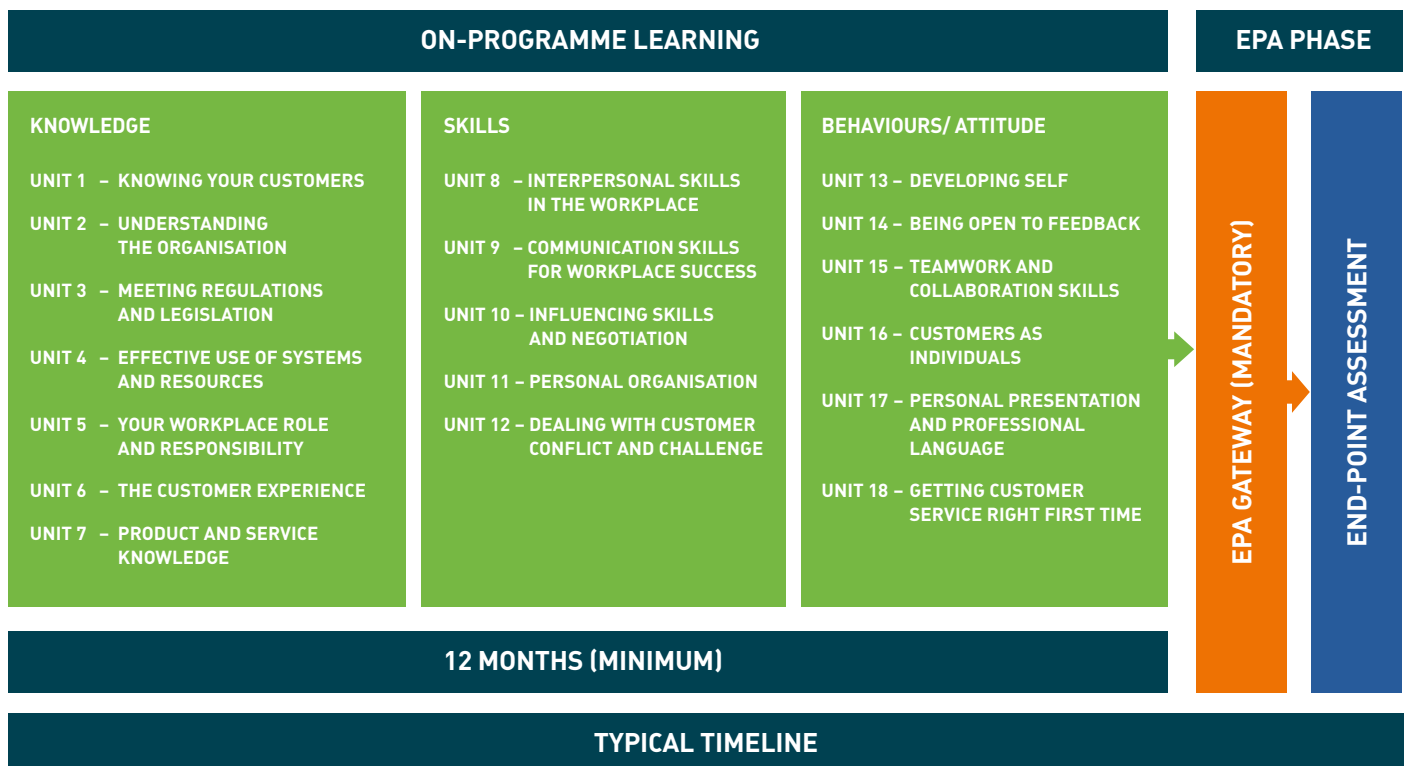
## LEVEL 2 – ST0072/AP02

### QUICK GUIDE

#### APPRENTICESHIP DURATION

The apprenticeship will take a minimum of 12 months to complete.

#### APPRENTICE DEVELOPMENT JOURNEY



# UNIT OVERVIEWS

**Units 1-7 will cover the knowledge requirements of the apprenticeship.**

Apprentices will gain knowledge and understanding across the following areas:

## UNIT 1 KNOWING YOUR CUSTOMERS

- Who customers are and the difference between internal and external customers
- The different needs and priorities of customers and the best way to manage their expectations, adapting style to be highly effective

## UNIT 2 UNDERSTANDING THE ORGANISATION

- The purpose of the business and what 'brand promise' means
- Core values of the organisation and how they link to the service culture
- Internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation

## UNIT 3 MEETING REGULATIONS AND LEGISLATION

- Appropriate legislation and regulatory requirements that affect your business
- Knowing own responsibility in relation to requirements and how to apply when delivering service

## UNIT 4 EFFECTIVE USE OF SYSTEMS AND RESOURCES

- How to use systems, equipment and technology to meet the needs of customers
- Types of measurement and evaluation tools available to monitor customer service levels

## UNIT 5 YOUR WORKPLACE ROLE AND RESPONSIBILITY

- Your role and responsibility within the organisation and the impact of your actions on others
- Targets and goals you need to deliver against

## UNIT 6 THE CUSTOMER EXPERIENCE

- How establishing the facts enables you to create a customer-focused experience and appropriate response
- How to build trust with a customer and why this is important

## UNIT 7 PRODUCT AND SERVICE KNOWLEDGE

- Products or services that are available from their organisation and keeping up-to-date

## Units 8-12 will cover the skill requirements of the apprenticeship.

Apprentices will develop their ability and be able to demonstrate skills across the following areas:

### UNIT 8 INTERPERSONAL SKILLS IN THE WORKPLACE

- Using a range of questioning skills, including listening and responding in a way that builds rapport, determines customer needs and expectations, and achieves positive engagement and delivery

### UNIT 9 COMMUNICATION SKILLS FOR WORKPLACE SUCCESS

- Depending on job role and environment:
  - Using appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or
- Using appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions
- Using an appropriate 'tone of voice' in all communications, including written and digital, that reflects the organisation's brand

### UNIT 10 INFLUENCING SKILLS AND NEGOTIATION

- Providing clear explanations and offering options in order to help customers make choices that are mutually beneficial to both the customer and the organisation

### UNIT 11 PERSONAL ORGANISATION

- Being able to organise self, prioritising own workload/activities and working to meet deadlines

### UNIT 12 DEALING WITH CUSTOMER CONFLICT AND CHALLENGE

- Demonstrating patience and calmness
- Showing understanding of the customer's point of view
- Using appropriate sign-posting or resolution to meet customers' needs and managing expectations
- Maintaining informative communication during service recovery

## Units 13-18 will cover the behaviour / attitude requirements of the apprenticeship.

Apprentices will be able to demonstrate behaviours / attitudes across the following areas:

### UNIT 13 DEVELOPING SELF

- Taking ownership for keeping their service knowledge and skills up-to-date
- Considering personal goals and proposing development that would help achieve them

### UNIT 14 BEING OPEN TO FEEDBACK

- Acting on and seeking feedback from others to develop or maintain personal service skills and knowledge

### UNIT 15 TEAMWORK AND COLLABORATION SKILLS

- Frequently and consistently communicating and working with others in the interest of helping customers efficiently
- Sharing personal learning and case studies with others, presenting recommendations, and improvement to support good practice

### UNIT 16 CUSTOMERS AS INDIVIDUALS

- Treating customers as individuals to provide a personalised customer service experience
- Upholding the organisation's core values and service culture through their actions

### UNIT 17 PERSONAL PRESENTATION AND PROFESSIONAL LANGUAGE

- Demonstrating professional pride in the job through appropriate dress and positive and confident language

### UNIT 18 GETTING CUSTOMER SERVICE RIGHT FIRST TIME

- Using communication behaviours that establish clearly what each customer requires and managing their expectations
- Taking ownership from the first contact and then taking responsibility for fulfilling promises

**READINESS FOR END-POINT ASSESSMENT GATEWAY (MANDATORY)**

- Achieved English + maths Level 1 (GCSE Grade D-G /Grade 1-3)
- Taken, but not necessarily passed, English + maths Level 2
- Minimum requirements for knowledge, skills and behaviours met
- The employer and training organisation agree that the apprentice is ready for EPA. (Confirmed via completion of the Apprentice Readiness for EPA Form).

**END-POINT ASSESSMENT****APPRENTICE  
SHOWCASE**

Takes place after  
a minimum of  
12 months of  
on-programme  
learning

**PRACTICAL  
OBSERVATION**

Pre-planned 1 hour  
observation in the  
workplace

**PROFESSIONAL  
DISCUSSION**

1 hour discussion

**FINAL RESULT**

Within 21 days  
of completing the  
Professional  
Discussion

## APPRENTICE SHOWCASE

The Apprentice Showcase enables apprentices to reflect and present examples of their development, that demonstrates what they know, can do, or are able to show as a result of completing each unit. With guidance from the employer and/or training organisation, the apprentice will select appropriate evidence from their on-programme portfolio to demonstrate the minimum requirements of the standard and present as an 'Apprentice Showcase'.

The apprentice showcase, as agreed by the employer and apprentice with the IMI, can be assessed face-to-face or remotely. It can be showcased by the apprentice through the delivery of a presentation or by a virtual form of assessment such as submission of a report, storyboard, journal etc.

Evidence is likely to arise from naturally occurring workplace activities, and may include: direct observation, customer feedback, manager's statements, digital recordings, screenshots, records of team meetings, witness statements, reflective accounts, performance reviews/appraisals etc.

The apprentice showcase will be reviewed and assessed by an Independent Assessor from the IMI.

## PRACTICAL OBSERVATION

The 1 hour practical observation will be pre-planned and scheduled for when the apprentice is in their normal place of work and will be carried out by the Independent Assessor.

The observation should enable the apprentice to evidence their skills, knowledge and behaviour from across the standard to demonstrate genuine and demanding work objectives.

Each situation within the observation will be different, and examples are, handling a general enquiry, dealing with a customer complaint or a need for further information or detail.

Those areas of the standard which are not able to be evidenced during the observation will be discussed subsequently as part of the professional discussion.

The practical observation will be assessed by an Independent Assessor from the IMI.

## PROFESSIONAL DISCUSSION

Following the observation, a 1 hour structured discussion will take place between the apprentice and the Independent Assessor, to establish the apprentice's understanding and application of knowledge, skills and behaviours. It will be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence.

An Independent Assessor from the IMI will plan the professional discussion in advance and in conjunction with the apprentice and employer. The professional discussion will take place in a suitable controlled environment, free from interruption and influence.

The discussion will be against set criteria to ensure standardisation and consistency.

The purpose of the professional discussion is to:

- Clarify any questions the Independent Assessor has from their assessment of the apprentice's journey 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 the apprentice would behave in specific scenarios, should they not have occurred within the practical observation
- Ask questions in relation to personal development and reflection.

The professional discussion will be assessed by an Independent Assessor from the IMI.

**FRAMEWORKS VS STANDARDS - ROLES AND RESPONSIBILITIES**

**FRAMEWORKS**

Frameworks include the completion of knowledge and competence based qualification through a quality assured training provision.

**THE APPRENTICE**

Attend off-the-job training by the provider

Visited by the provider in the workplace

**THE TRAINING PROVIDER**

Deliver a structured off-the-job training programme

Visit the Apprentice in the workplace

Provide coaching and support in the workplace

**THE EMPLOYER**

Allocate a mentor to support the Apprentice

**STANDARDS**

New standards typically focus on a number of gateways and an End-Point Assessment with an approved assessment organisation.

**THE APPRENTICE**

Attend off-the-job training by the provider

Visited by the provider in the workplace

Compile evidence of tasks completed in the workplace

Undertake annual behavioural assessments and gateway tests

Complete an End-Point Assessment

**THE TRAINING PROVIDER**

Deliver a structured off-the-job training programme

Provide gateway assessments

Typically host the End-Point Assessment

Provide support in the workplace, for the employer and Apprentice

Contribute to the annual behavioural assessments of the Apprentice

**THE EMPLOYER**

Allocate a mentor to coach and support the Apprentice

Review progress and readiness for End-Point Assessment

Contribute to the annual behavioural assessments of the Apprentice

## STAY CONNECTED



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