



# CUSTOMER SERVICE SPECIALIST APPRENTICESHIP STANDARD

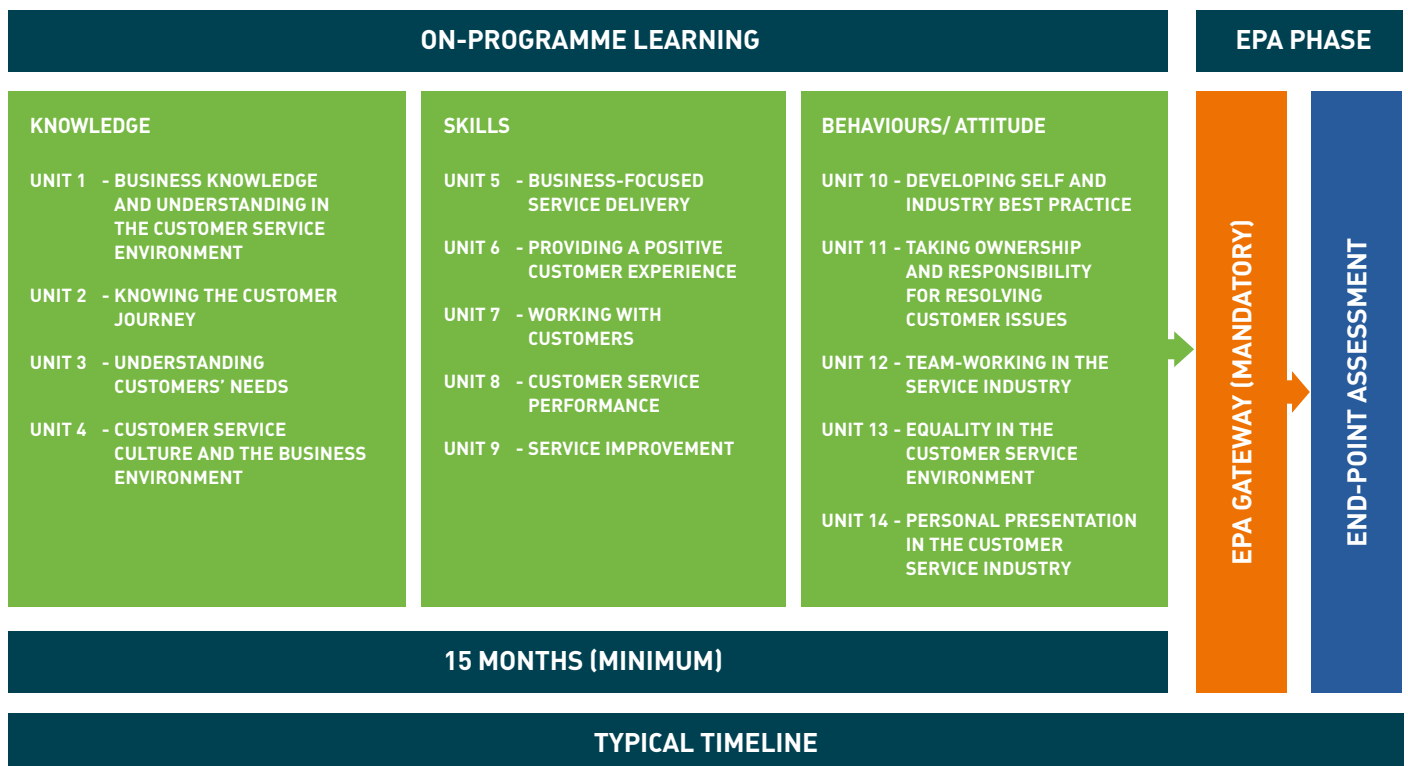
LEVEL 3 – ST0071/AP01

## QUICK GUIDE

### APPRENTICESHIP DURATION

The apprenticeship will take a minimum of 15 months to complete depending on experience.

### APPRENTICE DEVELOPMENT JOURNEY



# UNIT OVERVIEWS

**Units 1-4 will cover the knowledge requirements of the apprenticeship.**

Apprentices will gain knowledge and understanding across the following areas:

## UNIT 1 BUSINESS KNOWLEDGE AND UNDERSTANDING IN THE CUSTOMER SERVICE ENVIRONMENT

- What continuous improvement means in a service environment and how their recommendations for change impact the organisation, and the principles and benefits of being able to think about the future when taking action or making service-related decisions
- The impact that their service provision has on the wider organisation and the value it adds
- The organisation's current business strategy in relation to customers and making recommendations for its future
- Understanding and successfully applying a range of leadership styles in a customer service environment

## UNIT 2 KNOWING THE CUSTOMER JOURNEY

- Critically evaluating the possible journeys of customers, including challenges and the end-to-end experience
- Reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention
- The underpinning business processes that support in bringing about the best outcome for customers and the organisation
- Commercial factors and authority limits for delivering the required customer experience

## UNIT 3 UNDERSTANDING CUSTOMERS' NEEDS

- Knowing internal and external customers and how their behaviour may require different approaches
- How to analyse, use and present information to provide customer insight
- What drives loyalty, retention and satisfaction and how they impact on the organisation
- Different customer types and the role of emotions in bringing about a successful outcome
- How customer expectations can differ between cultures, ages and social profiles

## UNIT 4 CUSTOMER SERVICE CULTURE AND THE BUSINESS ENVIRONMENT

- Keeping current knowledge and understanding of regulatory considerations, drivers and impacts in relation to how they deliver for customers
- The business environment and culture and the position of customer service within it
- Organisation structure and what role each department needs to play in delivering customer service and what the consequences are should things go wrong
- How to find and use industry best practice to enhance own knowledge

## Units 5-9 will cover the skill requirements of the apprenticeship.

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

### UNIT 5 BUSINESS-FOCUSED SERVICE DELIVERY

- A continuous improvement and future-focused approach to customer service delivery
- Resolving complex issues by being able to choose from and successfully apply a wide range of approaches
- Finding solutions that meet the organisation's needs as well as customer requirements

### UNIT 6 PROVIDING A POSITIVE CUSTOMER EXPERIENCE

- Negotiating mutually beneficial outcomes through advanced questioning, listening and summarising
- Managing challenging and complicated situations within their level of authority and making recommendations to enable and deliver change to service or strategy
- Using clear explanations, providing options and solutions to influence and help customers make choices and agree next steps
- Exploring and interpreting the customer experience to inform and influence achieving a positive result for customer satisfaction
- Demonstrating a cost conscious mind-set when meeting customer and business needs
- Identifying where highs and lows of the customer journey produce a range of emotions in the customer
- Using written and verbal communication to simplify and provide complex information in a way that supports positive customer outcomes

### UNIT 7 WORKING WITH CUSTOMERS

- Proactively gathering customer feedback, through a variety of methods
- Critically analysing, and evaluating the meaning, implication and facts and acting upon them
- Analysing customer types, to identify or anticipate their potential needs and expectations when providing service

### UNIT 8 CUSTOMER SERVICE PERFORMANCE

- Maintaining a positive relationship even when unable to deliver the customer's expected outcome
- Managing referrals or escalations, taking into account historical interactions and challenges to determine next steps

### UNIT 9 SERVICE IMPROVEMENT

- Analysing the end-to-end service experience, seeking input from others where required, supporting development of solutions
- Making recommendations based on their findings to enable improvement
- Making recommendations and implementing where possible changes in-line with new and relevant legislation, regulations and industry best practice

## Units 10-14 will cover the behaviour / attitude requirements of the apprenticeship.

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

### UNIT 10 DEVELOPING SELF AND INDUSTRY BEST PRACTICE

- Proactively keeping service, industry and best practice knowledge and skills up-to-date, considering personal goals related to service and taking action towards achieving them

### UNIT 11 TAKING OWNERSHIP AND RESPONSIBILITY FOR RESOLVING CUSTOMER ISSUES

- Personally committing to and taking ownership of actions to resolve customer issues to the satisfaction of the customer and the organisation
- Exercising proactivity and creativity when identifying solutions to customer and organisational issues
- Making realistic promises and delivering on them

### UNIT 12 TEAM-WORKING IN THE SERVICE INDUSTRY

- Working effectively and collaboratively with colleagues at all levels to achieve results
- Recognising colleagues as internal customers
- Sharing knowledge and experience with others to support colleague development

### UNIT 13 EQUALITY IN THE CUSTOMER SERVICE ENVIRONMENT

- Adopting a positive and enthusiastic attitude, being open-minded and able to tailor their service to each customer, showing adaptability and flexibility to customer needs

### UNIT 14 PERSONAL PRESENTATION IN THE CUSTOMER SERVICE INDUSTRY

- Demonstrating brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction
- Ensuring their personal presentation, in all forms of communication, reflects positively on the organisation's brand

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

- English + maths Level 2 (GCSE Grade C/Grade 4 or above)
- 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**



**PRACTICAL OBSERVATION (WITH Q&As)**

The practical observation is covered in one session, lasting 1 hour and must take place in the apprentice’s workplace.

The apprentice will be given 2 weeks’ notice of the practical observation and it must take place within 3 months from the start of the End-Point Assessment period.

The apprentice will be observed by an Independent Assessor undertaking a range of day-to-day workplace activities. The observation should involve activities which allow the apprentice to demonstrate the full range of their knowledge, skills and behaviours required.

The amount of questioning time carried out during the observation should not exceed 15% of the total time allowed for the practical observation.

The practical observation must:

- Reflect typical working conditions
- Allow the apprentice to demonstrate all aspects of the standard being assessed
- Take a synoptic approach to assessment of the overall competence
- Be carried out on a one-to-one basis.

An Independent Assessor from the IMI will grade the practical observation as Fail, Pass or Distinction using the grading criteria.

## WORK-BASED PROJECT (SUPPORTED BY AN INTERVIEW)

Apprentices must submit a written report, on a project they have carried out, two weeks prior to an interview date.

The work-based project should be completed within 2 months from the start of the End-Point Assessment period.

The work-based project is designed to ensure the apprentice's learning meets the needs of the business and is relevant to their role. The employer will ensure the apprentice has sufficient time and the necessary resources to plan and undertake the research and produce the written report.

The written report must be 2500 words (+/- 10%), excluding Annexes.

The project should cover a specific high-level challenge (such as a complaint or difficult situation) that the apprentice has dealt with, explaining what it was, what actions (planning and execution) were taken, what solutions were offered, details of any recommendations made to change a policy or process and any feedback from the customer. The subject of the project report will be selected from the list of IMI-approved Work-based Project 'High Level Challenges'.

## INTERVIEW TO SUPPORT THE WORK-BASED PROJECT

The work-based project will be supported by an interview, which will:

- Take place with an Independent Assessor from the IMI
- Last for 60 minutes (+/- 10%) and include 10 questions
- Focus on the written project and any supporting Annexes
- Take place in a suitable controlled environment. i.e. a quiet room, free from distraction and influence.

An Independent Assessor from the IMI will grade the work-based project and interview holistically as Fail, Pass or Distinction using the grading criteria.

The interview will take place before the end of the 3 month End-Point Assessment period.

## PROFESSIONAL DISCUSSION (SUPPORTED BY PORTFOLIO OF EVIDENCE)

A structured discussion will take place between the apprentice and an Independent Assessor from the IMI to establish the apprentice's understanding and application of knowledge, skills and behaviours.

The Independent Assessor will plan the professional discussion in advance and in conjunction with the apprentice and employer. This will take place within 3 months from the start of the End-Point Assessment period.

The professional discussion will take place in a suitable environment, (a quiet room, free from distraction and influence), and will last for approximately 1 hour.

Apprentices will select 10-15 pieces of evidence from their portfolio and submit this evidence to the IMI two weeks prior to the agreed professional discussion date. This evidence will be used to support the discussion.

The discussion will be against set criteria to ensure standardisation and consistency. It will be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence. The apprentice must have access to their portfolio during the discussion.

An Independent Assessor from the IMI will grade the professional discussion as Fail, Pass or Distinction using the grading criteria.

**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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