

# STA Excel Me Level 2 End Point Assessment for ST0072 Customer Service Practitioner

Specification



## The Standard and Assessment Methods

Standard title and version	Customer Service Practitioner V1.1
Standard code	ST0072
Level	2
Duration of EPA	Typically 4 months

## Assessment Methods

During EPA the apprentice must complete three assessment methods as outlined in the table below.

Assessment Method	Timings
Apprentice Showcase	30 minutes
Practical Observation	1 hour (+10%)
Professional Discussion	1 hour

## Gateway Requirements

Prior to EPA, the following requirements must be met by the apprentice.

Requirement	Description
Occupational competency	The training provider and employer agree the apprentice is consistently meeting the KSBs within the assessment plan. This will happen during a meeting involving the apprentice, their line manager and the trainer.
Gateway declaration	The training provider, employer and apprentice must sign and submit the gateway declaration.
Functional skills	Complete training towards English and mathematics qualifications in line with the apprenticeship funding rules.
Portfolio of evidence	Apprentices may develop and maintain examples of their work throughout their apprenticeship that cover the full standard. This could be in the form of a portfolio or other tracking method to be reviewed on-programme at intervals agreed by the employer and training provider, for example at 3, 6 and 9 months.

Assessment can only take place once these requirements have been met.

## Grading

Each assessment component is graded individually which are combined to produce an overall grade. Each assessment component outcome includes a fail, pass and distinction grade.

	Assessment Outcomes		
Assessment Method	Weighting	To achieve a Pass	To achieve a Distinction
Apprentice Showcase	65%	100%	You must meet all of the pass criteria <b>AND</b> 70% of the distinction criteria
Practical Observation	20%	100%	You must meet all of the pass criteria <b>AND</b> 80% of the distinction criteria
Professional Discussion	15%	100%	You must meet all of the pass criteria <b>AND</b> 75% of the distinction criteria

## Retake and Resits

A retake or resit will be determined when the apprentice fails an assessment component. Depending upon the nature of the fail, Excel Me determine whether a retake or resit is most appropriate.

A retake requires the apprentice to undertake additional training prior to attempting the reassessment. A resit involves scheduling a reassessment without the requirement for additional training.

## Results and Certification

Once all assessments have been successfully completed a final grade will be allocated. Confirmation of achievement will be communicated to the apprentice employer and training provider. Excel Me will claim certificates via the Institute for Apprenticeships and Technical Education (IfATE) and sent to the address provided during the planning meeting.

## Assessment Location

Assessments are conducted using remote video conferencing software, except where a face-to-face reasonable adjustment is in place, or if there is a requirement by the assessment plan to undertake the assessment face-to-face

## Language of Assessment

All assessments are conducted in English unless a reasonable adjustment is in place.

## Reasonable Adjustment

Reasonable adjustments are changes made to an assessment or to the way an assessment is conducted that reduce or remove a disadvantage caused by a student's disability. Further information on reasonable adjustment can be found within the Excel Me Reasonable Adjustment policy made available on the Excel Me website.

If an apprentice requires adjustment to their assessment, this must be recorded at the planning meeting.

## Additional Guidance

Additional guidance to support EPA guidance including the gateway declaration form and portfolio of evidence matrix is available from Excel Me.

## **End Point Assessment Components**

### **1. Apprentice Showcase Presentation**

The apprentice showcase is compiled after 12 months of on-programme learning. The Apprentice Showcase enables apprentices to reflect and present examples of their development over the whole on-programme period. With guidance from the employer and/or training provider the apprentice will select appropriate evidence from the on-programme portfolio to demonstrate the minimum requirements of the standard at the final stage of the programme as an 'Apprentice Showcase'. This will attest to professional competence at the level.

The apprentice showcase will be reviewed and assessed by the independent assessor. The evidence contained in the apprentice showcase will be assessed against the following areas of the standard as highlighted below:

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

Employers within the sector have strongly expressed that end point assessment methods should be flexible, and where possible delivered virtually due to the impact of demand fluctuation on the quality of customer service within the sector. The apprentice showcase, as agreed by the employer and apprentice with the assessment organisation, can therefore be assessed face to face or remotely. It can be showcased by the learner through the delivery of a presentation or by a virtual form of assessment such as submission of a report, storyboard, journal etc to the assessment organisation.

The apprentice showcase will be assessed against an externally set brief, written by the assessment organisation, working with Employers and other stakeholders, as appropriate, to ensure consistency.

It is expected that the externally set brief will include elements such as work-based evidence, including customer feedback, recordings, manager statements, and witness statements. It will also include evidence from others, such as mid-and-end of year performance reviews, and feedback. It is important to acknowledge that the employer and training provider will work together throughout the on-programme learning, ensuring all learning is consistently applied throughout the apprenticeship and not just at the End Point Assessment or in the Apprentice Showcase. The apprentice will then present to the Independent Assessor to provide an opportunity for them to interview the apprentice and delve deeper in to the learning and experience. This is to ensure rigor, competence and independence.

## Assessment Criteria- Showcase Presentation

What does the Apprentice need to show	PASS criteria
<b>Understanding the organisation</b>	
1.1 What is the difference between public, private and third sector organisations	PASS: State the aims of the organisation in relation to its sector.
1.2 What is your organisation business type and purpose? 1.3 What does 'brand promise' mean?	PASS: State what is meant by the organisation's 'brand promise'.
2.1 What is meant by an organisations core values? 2.2 What are your organisations core values? 2.3 What is meant by service culture? 2.4 What is your organisations service culture? 2.5 How does your organisations core values link to the service culture?	PASS: Explain how the organisation's core values relate to its service culture
3.1 What is the purpose of an organisational policy? 3.2 List the organisational policies and procedures that could affect a customer service role? 3.3 What should be included in a complaints process/procedure?	PASS: State the purpose of different organisational policies and procedures that affect their customer service role
3.4 What is meant by digital media? 3.5 What digital media policies exist in customer service organisations?	PASS: Describes the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment

**DISTINCTION:** Explain how the organisational policies and procedures impact on the delivery of customer service.

## Meeting regulations & legislation

**1.1 Identify appropriate legislation and regulation and how this affects your organisation**

PASS; Explain how relevant legislation and regulations affects the organisation's customer service provision

**2.1 Why is it important to keep information confidential within an organisation**

**2.2 What information needs to be kept and remain confidential within your organisation?**

PASS; State own responsibilities for keeping information confidential in the organisation

**2.3 What are the responsibilities of the employee under the health and safety at work act?**

**2.4 What are the responsibilities of the employer under the health and safety at work act?**

PASS: State the responsibilities of employees and employers under the Health and Safety at Work Act

**DISTINCTION:** Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations.

**DISTINCTION:** Explain how a code of practice or ethical standards affects customer service.

## Systems & Resources

**1.1 What are the systems, equipment and/or technology your organisation uses to effectively meet customer needs?**

**1.2 In your role how would you use the systems, equipment and/or technology to support customer needs?**

PASS: Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively

**2.1 What are the types of measurement used to monitor customer service level?**

**2.2 What are the types of evaluation tool used to monitor customer service levels?**

PASS: Describe the measures and evaluation tools used in the organisation to monitor customer service levels

## **Product & service knowledge**

**1.1 What are your organisations products and/or services?**

**1.2 What is the difference between providing a product and providing a service.**

PASS: Explain the difference between the features and benefits of products and/or services in relation to the organisation

**1.3 How do you update and maintain your knowledge of your organisations products and/or services?**

PASS: Describe how to maintain their knowledge of the organisation's products and/or services

**DISTINCTION:** Explain why it is important to update their knowledge on the organisation's products and/or services.

## **Influencing skills**

**1.1 Identify customer needs**

PASS: Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation

**1.2 Offer product and/or service options to customers in a logical and reasoned manner**

**1.3 Clearly explain how options offered meets the customers' needs.**

PASS: Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs

**1.4 Handle customer objections in a positive and professional manner**

PASS: Handle customer objections in a positive and professional manner

**DISTINCTION:** Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached.

### Personal organisation

1.1 Agree goals and deadlines for completing tasks with an appropriate person.

1.2 Prioritise and plan the completion of tasks to meet delivery deadlines

PASS: Prioritise and plans the completion of tasks according to agreed deadlines

1.3 Use tools and techniques to monitor progress of tasks

1.4 Monitor and adjust priorities as required

1.5 Meet agreed deadlines

PASS; Use appropriate tools and techniques to monitor the progress of task completion

**DISTINCTION:** Respond in a professional manner to challenges and changes and adjust priorities accordingly.

### Dealing with customer conflict & challenge

2.1 Show patience, calmness and empathy when dealing with challenging customer situations

2.2 Use active listening skills when communicating with customers

2.3 Use appropriate questioning skills

PASS: Maintain calm and patience at all times when dealing with challenging customer situations.

3.1 Show understanding of the customer view point

PASS: Demonstrate sensitivity to, and interest in, the customers' concerns.

4.1 Explain the next steps and/or customer options in a logical manner

PASS: Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers



**4.2 Provide clear sign-posting or resolution to meet customers' needs and manage customer expectations**

**4.3 Deal with the customer conflict or challenge presented in line with organisational and/or policies procedure**

**4.4 Resolve customer conflict or challenge presented in line with organisational policies and/or procedures**

PASS: Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures.

**5.1 Keep customers informed of progress while resolving issues**

PASS: Keep customers informed of progress while resolving issues.

**5.2 Maintain accurate record of customer issues and progress to resolution**

PASS: Maintain accurate record of customer issues and progress to resolution.

**DISTINCTION:** Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.

## **Developing self**

**1.1 Identify own strengths and weaknesses in relation to working within a customer service role.**

**1.2 Apply the techniques of self assessment to look at strengths and weaknesses**

PASS: Conduct a self-assessment to identify own strengths and weaknesses in relation to the job role

**2.1 Prepare a personal development plan that helps to achieve personal goals and development needs.**

**2.2 Review and update your personal development plan**

PASS: Produce a personal development plan to support the achievement of their agreed learning and development goals

**DISTINCTION:** Review the effectiveness of their personal development plan and update it accordingly.

## **Being open to feedback**

1.1 Identify suitable ways of obtaining informal and formal feedback from others.	PASS: Seek constructive feedback from others about their customer service skills and knowledge
1.2 Obtain useful and constructive feedback about your own service skills and knowledge from others	
1.3 Positively respond to all feedback	PASS: Uses feedback from others to develop their customer service skills and knowledge
1.4 Use the feedback received to take responsibility for maintaining and developing your personal customer service skills and knowledge.	
Team working	
1.1 Demonstrate the interpersonal skills required to work effectively as part of a team	PASS: Work with others in a positive and productive manner
1.2 Communicate consistently with team members in the interest of helping customers.	PASS: Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently
1.3 Demonstrate cooperation when working with others	
2.1 Share personal learning with others to support good practice.	PASS: Share personal learning and information with others to support good customer service practice
2.2 Present your ideas and recommendations for improvements in customer service to others	
<b>DISTINCTION:</b> Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers.	
<b>DISTINCTION:</b> Present reasoned ideas for improving customer service practice to the appropriate colleagues.	

## **2. Practical Observation & Professional Discussion**

The practical observation and professional discussion provides the opportunity for substantial synoptic assessment across the standard and must include customer interaction.

### **Practical Observation**

The practical observation will be pre-planned and scheduled to when the apprentice will be 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, but it is mandatory that the observation covers as a minimum: presentation, equality, interpersonal skills, communication and personal organisation. 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 with the Independent Assessor.

### **Professional Discussion**

The professional discussion will be a structured discussion between the apprentice and the Independent Assessor, following the observation, to establish the apprentice's understanding and application of knowledge, skills and behaviours. The professional discussion will need to take place in a suitable environment and should last for a maximum of one hour. The discussion will be against set criteria in the occupational brief 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 purpose of the professional discussion is to:

- clarify any questions the Independent Assessor has from their assessment of the learner 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;
- provide a basis for the Independent Assessor to make a decision about the grade to be awarded.

## Assessment Criteria- Practical Observation

What does the Apprentice need to do	PASS criteria
<b>Interpersonal Skills</b>	
<b>1.1 Demonstrate effective interpersonal skills that achieve positive customer engagement using:</b> <ul style="list-style-type: none"> <li>• Effective use of open and closed questioning skills relevant to the situation</li> <li>• Effective use of active listening skills when communicating</li> <li>• Effective use of body language when interacting with customers</li> <li>• Working with others and sharing good practice when performing your duties</li> </ul>	<p>PASS: Demonstrate willingness and ability to engage with customers in a positive manner using relevant interpersonal skills.</p>
<b>1.2 Recognise customer needs and expectations</b> <b>1.3 Respond to customer needs and manage expectations in a professional and timely manner</b>	<p>PASS: Work with customers to build a rapport, recognising and where possible meeting their needs and expectations.</p>
<b>1.4 Build and maintain a rapport with customers</b>	<p>PASS: Show willingness to work with others and share ideas where appropriate.</p>
<b>DISTINCTION:</b> Demonstrate 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).	
<b>DISTINCTION:</b> Demonstrate ability to balance the needs and expectations of the customer with that of the organisation.	

**DISTINCTION:** Pro-actively work with others to ensure efficient customer service delivery.

## Communication

**1.1 Use appropriate methods of verbal and non-verbal communication skills relevant to your work environment**

PASS: **Face to face'**. Demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills.

**1.2 Use appropriate body language to maintain or enhance the customer experience**

PASS: Adapt tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations.

**1.3 Adapt the tone and/or behaviour to maintain or enhance the customer experience as appropriate**

PASS: Demonstrate ability to recognise when to summarise and the techniques to use.

**1.4 Confirm yours, and the customers, understanding of the customer's needs and expectations**

PASS: **Non- facing'**. Demonstrate ability to make initial customer contact and make use of appropriate communication skills.

**1.5 Use summarising language and/or reinforcement techniques during customer interaction to confirm understanding.**

PASS: Adapts tone and behaviour when necessary, recognising and confirming understanding of needs and expectations.

**1,6 Use correct, appropriate and clear communication skills e.g. written and verbal that reflect your organisations brand**

PASS: Demonstrates ability to recognise and use reinforcement techniques during customer interactions

**DISTINCTION: In all roles,** Demonstrate 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.

**DISTINCTION: In all roles,** In all roles, Demonstrate ability to flex to various customer personalities, while remaining calm and in control where necessary. They will also demonstrate they know the organisational procedures to be followed in all communication and the importance to the brand/organisation of this requirement.

## **Equality – treating all customers as individuals**

**1.1 Treat all customers equally, ensuring that you comply with legal requirements**

**1.2 Recognise and respond to individual needs to provide a personalised customer service experience**

PASS: Recognise and respond to individual needs to provide a personalised customer service experience.

**2.1 Act in a way that upholds the core values and service culture of the organisation**

PASS: Behave in a way that upholds the core values and service culture of the organisation.

## **Presentation – dress code, professional language**

**1.1 Present a tidy and professional image**

**1.2 Know and follow organisational dress code**

**1.3 Be approachable and welcoming when dealing with customers face to face**

PASS: Present a professional image in line with the organisational dress code and code of conduct.

**OR**

**1.4 Use a welcoming and approachable tone when in non-face to face situations**

**1.5 Present a positive attitude with all customers and in various situations**

PASS: Demonstrate a positive attitude and welcoming approach consistently when dealing with customers.

**1.6 Maintain professional and positive language in all situations**

**1.7 Be confident and calm in difficult situations**

PASS: Maintain professional and positive language consistently in customer interactions.

## **“Right first time”**

1.1 Make initial approach to customers in professional manner following organisational procedures	PASS: Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging.
1.2 Establish customer needs from customer wants	PASS: They will show an ability to establish needs and expectations, working towards meeting them where possible, explaining when necessary when they cannot be met
1.3 Work towards meeting customer needs	
1.4 Adapt tone and behaviour to meet customer needs and expectations	
1.5 Recognise customer expectations	PASS: Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures.
1.6 Manage customer expectations	
1.7 Check customer satisfaction	
1.8 Remain positive and professional when explaining when customer needs and/or expectations cannot be met.	
2.1 Establish initial contact with customers	PASS: Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers.
2.2 Recognise customer wants, needs and expectations	
2.3 Take responsibility and work with customers to achieve outcome	PASS: Take ownership from beginning to end, building and maintaining a relationship with the customer.
2.4 Maintain contact with customers where necessary and as promised (even if no additional information is available)	
2.5 Refer customers to others as required accurately passing on necessary information	PASS: Recognise the importance of good customer service to the customer and in turn the organisation, making contact as promised, referring to others as necessary with all required detail, following up to ensure conclusion.
2.6 Follow up as required to ensure outcome is reached	

2.7 Following organisational procedures, check customer satisfaction.

**Assessment Criteria- Professional Discussion**

What does the Apprentice need to know

PASS criteria

**Knowing your customers**

1.1 Who are my customers?

1.2 Who are the organisations customers?

1.3 Describe the different types of customers?

2.1 What is an internal customer?

2.2 What is an external customer?

2.3 Who are the organisations internal customers?

2.4 Who are the organisations external customers?

2.5 What is the difference between internal and external customers to the organisation?

PASS: Explain the difference between internal and external customers in the context of their organisation.

3.1 What is the purpose of customer service?

3.2 What are the different needs of your customers?

3.3 What are the different priorities of your customers?

3.4 Identify the specific needs that customers may have, including those that are protected under current equality law?

PASS: Describe the specific needs of different customers, including those protected under current Equality law.



3.5 What is meant by customer expectations?	PASS: Explain when and how to adapt their service approach to meet the needs and expectations of customers.
3.6 How does the standard of customer service affect the success of your organisation?	
3.7 When do you adapt your service approach to meet the needs and expectations of your customers?	PASS: Explain when and how to adapt service approach to meet the needs and expectations of customers.
3.8 How you adapt your service approach to meet the needs and expectations of your customers?	
<b>DISTINCTION:</b> Explain the importance of building good customer relationships to the organisation.	
<b>DISTINCTION:</b> Explain the difference in the way internal and external customer relationships are managed.	
<b>DISTINCTION:</b> Explain the importance of balancing the needs of both the organisation and its customers.	
<b>Your role and responsibility</b>	
1.1 What is your job role and responsibilities within that role?	PASS: Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation.
1.2 How do your actions impact on others in your organisation?	
2.2 Identify the targets and goals for your role.	PASS: Describe how to achieve their agreed targets and goals.
2.3 How do you achieve your targets and goals?	
<b>Customer Experience</b>	
1.1 What is meant by a customer focused experience?	PASS: Explain how an understanding of the facts can be used to create a customer focused experience.

1.2 How do you establish the facts to create a customer focused experience?

1.3 How do you use the facts create an appropriate response

2.1 Why is building customer trust important?

2.2 How would you start to build trust with your customers?

PASS: Explain how to build trust with customers and the importance of doing so.

**DISTINCTION:** Explain how to respond to customer needs and requirements positively.

