

STA Excel Me Level 3 End Point Assessment for ST0071 Customer Service Specialist

Specification



The Standard and Assessment Methods

Standard title and version	Customer Service Specialist V1.2
Standard code	ST0071
Level	3
Duration of EPA	Typically 3 months

Assessment Methods

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

Assessment Method	Timings
Practical observation with Q&As.	1 hour +/- 10% tolerance either way Within 3 months from the start of the end-point assessment period.
Work based project, supported by an interview.	The written report must be 2500 words (+/- 10%), excluding annexes. The interview will last for 60 minutes (+/- 10%) The work-based project is completed within 2 months from the start of the end-point assessment period. The interview will take place before the end of the 3-month end-point assessment period.
Professional discussion supported by portfolio evidence	1 hour +/- 10% tolerance either way. Within 3 months from the start of the end-point assessment period.

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	The EPA should only commence once the employer is confident that the apprentice has developed all of the knowledge, skills and behaviours defined in the apprenticeship standard and they hold a portfolio to evidence this

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 Method	Assessment Outcomes	
	To achieve a Pass	To achieve a Distinction
Work based project, supported by an interview.	100%	You must meet all of the pass criteria AND 100% of the distinction criteria
Practical Observation with Q&As.	100%	You must meet all of the pass criteria AND 100% of the distinction criteria
Professional Discussion supported by portfolio evidence	100%	You must meet all of the pass criteria AND 100% of the distinction criteria

If an apprentice fails any part of the end-point assessment, then it a fail.

Retake and Resits

If the apprentice fails any part of the end-point assessment, further development must be provided prior to a re-sit or re-take. A re-take requires the apprentice to undertake further learning and therefore they would need to go through the Gateway process again.

Apprentices are able to retake/re-sit any individual assessment component where a pass has not been achieved. If a retake/re-sit is required, apprentices should complete retake/re-sits within 12 months. There is no limit to the number of retake/re-sits within the 12 months. An apprentice cannot retake/re-sit any part of the EPA to increase their grade from a pass to a distinction. The maximum grade awarded to a re-sit will be pass, unless Excel Me identifies exceptional circumstances accounting for the original fail. If the apprentice fails the work based project they will be asked to rework their project taking account of feedback from the independent assessor. Apprentices will have 1 month to rework their submission.

The apprentice will be able to submit previous evidence along with the new additional evidence.

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. The practical observation must take place at the employers premises.

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. Practical Observation (with Q&As)

The apprentice will be observed undertaking a range of day-to-day workplace activities to allow them to demonstrate the full range of their knowledge, skills and behaviours required.

The practical observation will last for 1 hour (+/- 10% tolerance either way) and must take place in the apprentice's workplace.

The apprentice will be asked questions by the independent assessor during the observation, to clarify knowledge and understanding is being applied. The questioning should not exceed 15% of the total observation time allowed (a maximum of 10 minutes). The independent assessor will ask the apprentice open questions must be open questions and they may ask supplementary questions as required to seek

further clarification. Supplementary questions will be devised by the independent assessor as required. The apprentice must be given a minimum of 2 weeks' notice of 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 the overall competence.
- Be carried out on a one-to-one basis.

The independent assessor will plan the practical observation in conjunction with the apprentice and their employer, taking account of workplace considerations. This would typically include timing, the right environment, and enough space for the apprentice to be able to do their job. The independent assessor will observe the apprentice undertaking a range of day-to-day workplace activities.

During the practical observation the apprentice should have the opportunity, if required, to move from one area/function of the business to another in order to best demonstrate how they have applied their KSBs in a realistic work environment to achieve genuine and demanding work objectives.

Grade Descriptors

Knowledge Criteria
Knowing your customers and their needs/customer insight
How to analyse, use and present a range of information to provide customer insight
Understand different customer types and the role of emotions in bringing about a successful outcome.
Understand how customer expectations can differ between cultures, ages and social profiles.
Customer service culture and environment awareness
Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers
Skills Criteria
Business focused service delivery
Find solutions that meet your organisation's needs as well as the customer requirements
Providing a positive customer experience
Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes.
Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy
Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps.

Identify where highs and lows of the customer journey produce a range of emotions in the customer

Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format.

Customer service performance

Maintain a positive relationship even when you are unable to deliver the customer's expected outcome.

When managing referrals or escalations take into account historical interactions and challenges to determine next steps.

Behaviour Criteria

Ownership/responsibility

Personally, commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation.

Exercises proactivity and creativity when identifying solutions to customer and organisational issues

Team working

Work effectively and collaboratively with colleagues at all levels to achieve results.

Recognise colleagues as internal customers.

Equality

Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer.

Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment.

Presentation

Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction

Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand

Assessment Criteria

Fail Criteria

The Apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the Pass criteria

Shows a little or no understanding of their role in meeting the organisation's customer service standard.

Does not fully know or understand their organisation's service level agreement

Provides insufficient evidence to demonstrate an understanding of customer expectations.

Pass Criteria

An ability to assess at least three different customer types and their role of emotions in order to achieve a successful outcome for them.

Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.

Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction.

An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.

Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types

Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.

Recognises when customer emotions have been affected by the level of service offered.

Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.

Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.

Evidences when they have maintained a positive relationship even when they are unable to deliver the customer's expected outcome.

Evidences how they recognise when customer expectations are not met and demonstrates how, using appropriate communication techniques, this could be managed to maintain a positive relationship.

Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.

Shows proactivity and creativity when identifying solutions to customer and organisational issues.

Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures.

Demonstrates achievement of results through effective teamwork and collaboration with colleagues at all levels.

Shows adaptability of own skills when working with internal customers.

Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.

Evidence to show how their personal presentation made a positive impact on their organisation's brand.

Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.

Demonstrates how they analyse, use and present a range of information in order to provide customer insight.

Distinction Criteria

Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.

Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.

2. 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. This date will be agreed when the Apprentice passes through the gateway process. The written report must be 2500 words (+/- 10%), excluding annexes. All work on the project will be undertaken following the gateway process over a two-month period.

The subject of the project report should be agreed with Excel Me with guidance from the employer, in order to allow them to comment on appropriateness for their business.

The subject 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), the tools, what solutions were offered, details of any recommendations made to change a policy or process and any feedback from the customer. Details should also include the Apprentice's responsibilities and results. The report should contain annexes that are attributable to the Apprentice and the actions they took. Example evidence could be emails, letters, meeting notes, call logs, workflow documents or feedback.

Although there is flexibility in the order in which each assessment method is carried out, it is recommended that the written work-based project takes place before the professional discussion. 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.

Interview (Work-based project)

The work-based project will be supported by an interview

- The interview will take place with an Independent Assessor
- The interview will last for 60 minutes (+/- 10%)
- The interview will focus on the written project and any supporting annexes

Grade Descriptors

Knowledge Criteria
Business, Knowledge and Understanding
Understand your organisation's current business strategy in relation to customers and make recommendation for its future.
Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation.
Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions.
Customer Journey knowledge
Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience.
Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation.
Customer service culture and environment awareness
Understand your business environment and culture and the position of customer service within it.
Understand your organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong.
Skills Criteria
Business focused service delivery

Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice.

Providing a positive customer experience

Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction.

Working with your customers/customer insights

Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it

Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service.

Service Improvement

Analyse the end-to-end service experience, seeking input from others where required supporting development of solutions.

Make recommendations based on your findings to enable improvement.

Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice

Assessment Criteria

Fail Criteria

The Apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the Pass criteria

Fails to recommend improvements in customer service provision.

Does not demonstrate an understanding of customer journeys.

Shows limited ability in understanding customer journeys to ensure successful outcomes

Pass Criteria

Evidence that they understand the impact of the organisation's mission statement and business strategy on customer service delivery and make recommendations for future improvements

Ability to recommend improvement to the customer service provision, the steps required to implement this change and the benefit this change could have on the organisation and their own role

Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.

An understanding of the underpinning business processes that support them on bringing about the best outcome for customers and their organisation.

Provides evidence to show how they identify information which can be used by their organisation to provide customer insight and identify how this information can be analysed, used and presented.

Ability to discuss the internal and external factors influencing their business environment and culture

Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery.

Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.

Ability to identify potential causes of service failure and the consequences of these

Evidences when they made decisions and recommendations to improve their own customer service delivery

Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.

Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements.

Ability to gather and analyse information about the types of customers their organisation has and explain how the service they provide meets their potential needs and expectations.

Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.

Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required.

Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.

Distinction Criteria

Evidence to support their research and analysis of customer service standards and mission statements of other organisations, in comparison to their own organisations, to inform their recommendations.

Ability to consider the possible impact on their organisation of not considering the future in decision-making.

Demonstrates how knowing their customer and their needs has a direct impact on:

- Their working practices
- Organisational policy/procedures

Ability to demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation.

Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s).

Provides evidence to show when they analyse the risks and opportunities to implementing change.

Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended alternative methods likely to improve results, stating reasons for choice.

Evidence to show when they have proactively gathered customer feedback, through a variety of methods and used alternative recommendations to change the customer service level agreement in order to provide an improved service.

Demonstrates an ability to identify trends/recurring issues and analyse why they occurred and record possible ways of addressing them to ensure they do not reoccur.

3. Professional Discussion supported by a Portfolio of Evidence

The professional discussion, supported by portfolio evidence, will last approximately 60 minutes ($\pm 10\%$).

During the discussion, the Apprentice will reference their on-programme portfolio to support their responses. They must select between 10 and 15 pieces of evidence that align with the relevant standards for the professional discussion. This evidence may include witness statements, customer feedback (e.g., emails or letters), and manager feedback from one-to-one meetings or similar sources. The portfolio itself will not be directly assessed.

Apprentices must submit the required portfolio (10–15 pieces) at least two weeks before the scheduled discussion date. This date will be confirmed once the Apprentice has passed through the Gateway process.

The Independent Assessor will review the portfolio in advance to help plan the discussion. During the session, Apprentices must provide real-life examples demonstrating how they've applied their knowledge and skills in their role. Typically, the professional discussion will take place on the same day as the practical observation.

Grade Descriptors

Knowledge Criteria
Business, Knowledge and Understanding
Understand the impact your service provision has on the wider organisation and the value it adds
Understand a range of leadership styles and apply them successfully in a customer service environment
Customer journey knowledge
Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention.
Understand commercial factors and authority limits for delivering the required customer experience.
Knowing your customers and their needs/customer insight
Know your internal and external customers and how their behaviour may require different approaches from you
Understand what drives loyalty, retention and satisfaction and how they impact on your organisation.
Customer service culture and environment awareness
Understand how to find and use industry best practice to enhance own knowledge.
Skills Criteria
Business focused service delivery
Resolve complex issues by being able to choose from and successfully apply a wide range of approaches.
Providing a positive customer experience
Demonstrate a cost-conscious mind-set when meeting customer and the business needs
Behaviour Criteria
Develop self
Proactively keep your service, industry and best practice knowledge and skills up-to-date.
Consider personal goals related to service and take action towards achieving them.

Ownership/responsibility

Make realistic promises and deliver on them.

Team working

Share knowledge and experience with others to support colleague development.

Assessment Criteria

Fail Criteria

The Apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the Pass criteria.

Does not understand the content and importance of the organisation's service level agreement.

Demonstrates limited knowledge and understanding of whom the internal and external customers are and their expectations.

Provides no knowledge and understanding of leadership styles.

Gives ineffective evidence of personal learning and development goals and shows no understanding of how they can be achieved.

Pass Criteria

Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments

Evidence of how they identify the different types of leadership styles that work best in their customer environment.

Demonstrates when they have balanced the meeting of their customer and their organisation's needs while showing they have considered cost implications.

Demonstrate sharing own knowledge and experience with others, to support colleague development.

Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.

Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the limit of their authority when providing customer service

Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations.

Demonstrates responsibility and ownership in resolving customer issues, by getting the right people involved and delivering on promises, to the satisfaction of the customer and their organisation.

Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.

Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation

Evidences knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development.

Provides evidence to demonstrate how they have achieved learning and development goals, identified in an agreed personal development plan, in relation to their knowledge and skills of customer service, in the industry and best practice.

Distinction Criteria

Evidences when they have assessed the impact of sharing their own knowledge on:

- Their development
- Colleague development

Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach.