

# Transitioning to the Customer Service Practitioner apprenticeship standard

Presenters:

Mandy Slaney, Industry Manager

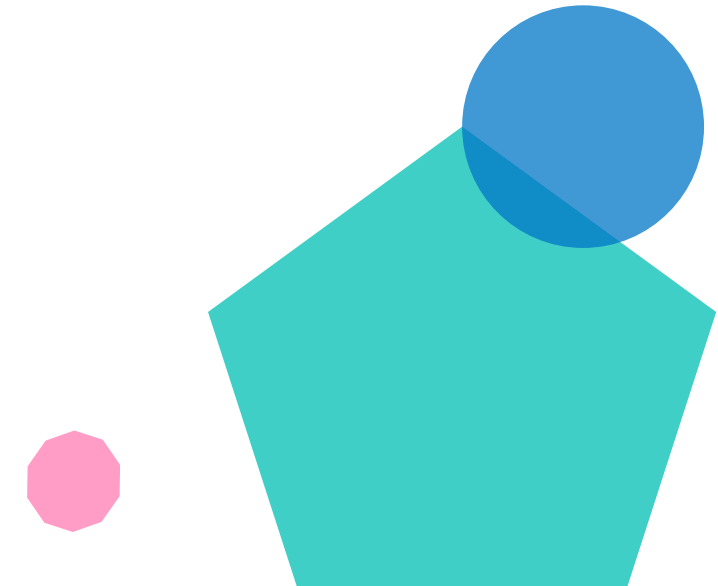
Dominic Green, Technical Advisor

14 June 2018

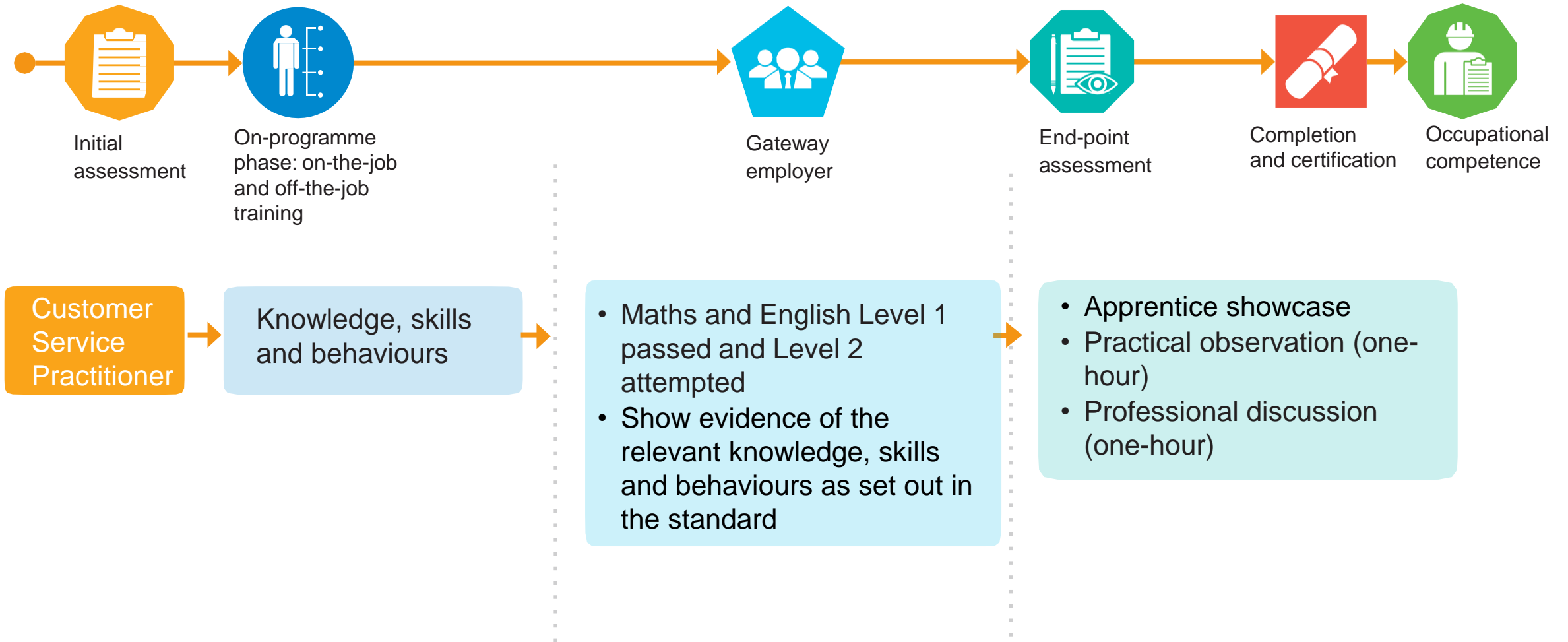


# Contents

- A re-cap of the Customer Service Practitioner apprenticeship standard – what you need to know.
- How we can support your 20% off-the-job learning – a range of teaching and learning resources to support on-programme delivery.
- Our EPA service for Customer Service Practitioner .
- Next steps.
- Question and answers.



# The Customer Service Practitioner apprenticeship standard



# Customer Service Practitioner standard

## Knowledge

- Knowing your customers.
- Understanding the organisation.
- Meeting regulations and legislation.
- Systems and resources.
- Your role and responsibilities.
- Customer experience.
- Product and service knowledge.

## Skills

- Interpersonal skills.
- Communication.
- Influencing skills.
- Personal organisation.
- Dealing with customer conflict and challenge.

## Behaviours/attitude

- Developing self.
- Being open to feedback.
- Team working.
- Equality – treating all customers as individuals.
- Presentation – dress code, professional language.
- ‘Right first time’.



# Occupational brief

Grading is covered in the occupational brief, for example:

Module	Standard	What do I need to know?	Pass criteria	Distinction criteria	Method of assessment
<b>Product and service knowledge.</b>	1. Understand the product or services that are available from your organisation and keep-up-to-date.	1.1 What are your organisations products and/or services?	Explain the difference between the features and benefits of products and/or services in relation to the organisation.	Explain why it's important to update their knowledge on the organisation's products and/or services.	Apprentice showcase.
		1.2 What is the difference between providing a product and providing a service?			
		1.3 How do you update and maintain your knowledge of your organisations products and/or services?	Describe how to maintain their knowledge of the organisation's products and/or services.		

# Customer Service Practitioner standard

Mapping to existing qualification.

Knowledge	Apprenticeship: what is required	City & Guilds qualification units and learning outcomes for the Level 2 Diploma in Customer Service (5530-02)
Product and service knowledge.	Understand the products or services that are available from your organisation and keep up to date.	<p>201 – Deliver customer service.            LO1 – Understand customer service delivery.            LO3 – Be able to prepare to deal with customers.</p> <p>210 – Promote additional products and/or services to customers.            LO1 – Understand the promotion of additional products and/or services to customers.            LO2 – Be able to promote additional products and/or services to customers.</p> <p><i>The apprentice must understand the difference between providing a product and providing a service. They should also be able to explain why it is important to update their knowledge on the organisation's products and/or services.</i></p>

# Key documents for this standard

## The Customer Service Practitioner apprenticeship standard

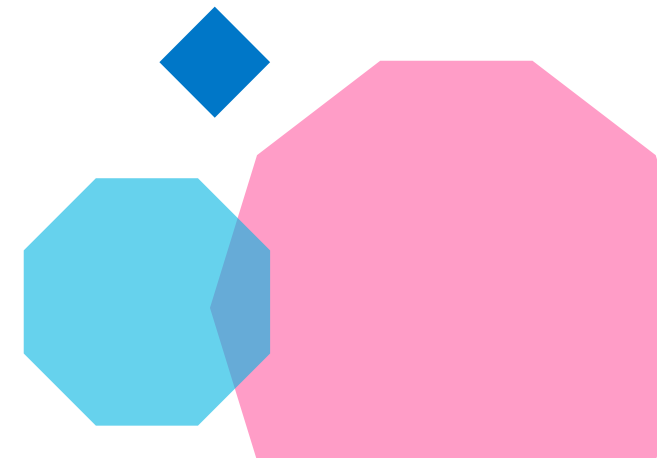
- Short, easy to understand document that describes the competencies required to undertake that occupation well.
- Designed by the employer group.
- Approved by IfA.

## The assessment plan

- Describes the apprentice journey and EPA for that particular apprenticeship standard.
- What will be assessed; how it will be assessed; who it will be assessed by.

## **The EPA customer pack**

- Available to customers who have registered for Customer Service Practitioner EPA.
- Describes the EPA process in detail.
- Contains the requirements to prepare for EPA.



# Off-the-job training, the vital 20%

Off-the-job training must be directly relevant to the apprenticeship standard and must take place within the apprentice's normal working hours. It can include:



Teaching of theory - lectures



Simulated exercises and role play



Attendance at competitions



Manufacturer training  
e.g. new equipment or technologies



Learning support provided by employer or the provider



Some online learning  
e.g. webinars or blended learning



Shadowing or being mentored



Practical training



Visiting the employer's other departments



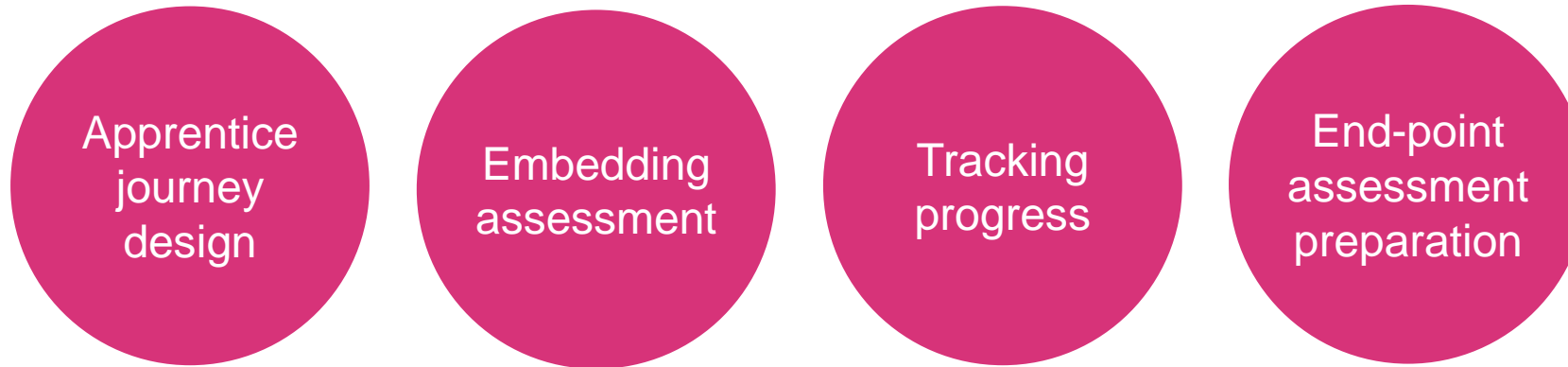
Time spent by the apprentice writing assessments/assignments



Industry visits or visiting other companies or suppliers



# Our offer designed around centres, employers and apprentices



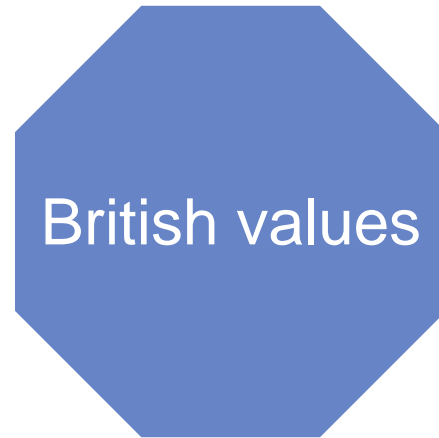
Improving the delivery and success of your apprenticeships, particularly when focused on:

- portability and visibility
- apprentice experience
- apprentice motivation.

# Essential content

Apprentice  
journey  
design

Our blend of e-learning and core content covers:



# Apprenticeship training manual

Apprentice  
journey  
design



# Apprenticeship training manual

**Task 1:**  
**Induction part one –**  
**Understanding organisation types**

To complete this task you need to carry out research into the organisation you work in. Your organisation will form part of one of three sectors: the public sector, the private sector or the third sector. There are major differences between these three sectors, mainly in their purpose, the way they are run and financed as well as what they do with any profits.

To understand how your organisation's policies and procedures affect your customer service role, it is important to recognise how the customer service offered differs between the three sectors. Talk to your employ colleagues about your organisation – they will have an insight into the way it aims relate to its sector.

When completing this task, you will:

- research the purpose of your organisation
- find out what is meant by 'brand promise'
- consider how your organisation's core values link to their service customers

**Task 1:**  
**Induction part one –**  
**Understanding organisation types**

**Key terms**

**Brand promise** – the statement that identifies what customers from the organisation's people, products and services. For example brand promise is: "To give everyone the power to create and do information instantly, without barriers".

**Core values** – the basic features of how an organisation goes about the practices the organisation follows every day in everything it does. For example, BMW's core values are: 'Integrity, Respect, Responsibility'.

**Private sector** – the part of a country's economic system that consists of individuals and companies, rather than the government. Most organisations are run with the intention of making profit for the owners and their shareholders.

**Public sector** – for instance the police, military, public roads, public education and healthcare. These are usually financed by things like tax, VAT or council tax. The public sector provides services such as collection which benefit everyone rather than just the individuals that encourage equal opportunity.

**Service culture** – a customer-centric approach to activities. Customers are put first. Employees ensure customers get a positive experience. For example, the service culture of Four Seasons Hotels Ltd. is that interactions with our guests, customers, business associates and employees seek to deal with others as we would have them deal with us.

**SWOT analysis** – SWOT is an acronym for Strengths, Weaknesses, Opportunities and Threats. Strengths and weaknesses are internal factors over which you have essentially no control. Opportunities and threats are external factors over which you have essentially no control.

**Third sector** – for instance, charities. These are a range of organisations that are neither public sector nor private sector, and are:

- independent of government
- motivated by the desire to achieve social goals
- sometimes called 'not-for-profit organisations'.



**Task 1:**  
**Induction part one –**  
**Understanding organisation types**

**Preparatory activities**

1. Explain one key similarity and one key difference between public and private sector businesses.

Similarity:

Difference:


2. Explain one key similarity and one key difference between public and third sector businesses.

Similarity:

Difference:



**English skills grid**



Some of the language and communication skills that you might develop	Task 1 Induction 1 – Understanding organisation types	Task 2 Induction 2 – Understanding customer expectations	Task 3 Creating a Personal Development Plan	Task 4 Presenting yourself and your organisation image	Task 5 Using feedback from colleagues	Task 6 Organising, prioritising and monitoring your workload	Task 7 Using organisational systems and resources	Task 8 Meeting legislation and regulations	Task 9 Treating all customers with equality and as individuals	Task 10 Interacting effectively with customers	Task 11 Providing customer focused experience	Task 12 Knowing your products and services	Task 13 Using digital media	Task 14 Improving your customer service offer	Task 15 Dealing with conflict
Where could you develop and/or demonstrate these skills?	T	E	T	E	T	E	T	E	T	E	T	E	T	E	T
<b>Speaking and listening</b>															
Listen for relevant information		✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Listen to and respond to questions		✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Listen/respond to criticism and constructive feedback					✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Use strategies to check and confirm understanding; ask questions, use facial expressions and body language		✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Follow discussions					✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Make useful contributions to discussions		✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Ask questions to obtain information		✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Express yourself clearly		✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Present your ideas clearly and logically		✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>Reading</b>															
Use different reading strategies – skimming, scanning, detailed reading		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Identify and understand the main points of what you are reading		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Identify and understand the important details in what you are reading		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Use organisational features to help you find the information you need		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Use knowledge of grammar and punctuation to help you understand what the text means		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Read and understand unfamiliar words and technical terms – check the meaning		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>Writing</b>															
Plan and draft writing		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Present information in a logical way		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Write in complete sentences		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Use paragraphs		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Use suitable language for purpose and audience		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Use the right layout/format and structure for the text you are producing		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Check and proofread writing for accuracy and sense		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Use correct grammar and punctuation		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Spell familiar and technical words correctly		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Produce clear and legible text		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

T – opportunity to practise and develop skills in task E – opportunity to produce evidence of skills in action when completing task

# Tutor support in SmartScreen



City & Guilds | SmartScreen

Search all courses

MY SUBJECTS CENTRE ADMIN REPORTS LOGOUT

My Subjects > Customer Service > Level 2 Diploma for Customer Service Practitioners > Recognition of regulations and legislation within own organisation

**QUALIFICATIONS**

Customer Service

**2794**

- 201** Developing self to achieve targets and goals
- 202** Recognition of regulations and legislation within own organisation
- 203** Principles of business
- 204** Contribute to a customer-focused experience
- 205** Provide customer service
- 206** Manage customer expectations
- 207** Working in a sales environment
- 208** Working in an administrative environment
- 209** Working in a contact centre environment
- 210** Customer service principles

**BUSINESS SKILLS**

CUSTOMER SERVICE

**2794 Level 2 Diploma for Customer Service Practitioners**  
202 Recognition of regulations and legislation within own organisation

Introduction

**Scheme of work**

DOC Scheme of work (tutor only) PDF Scheme of work (tutor only)

Sample lesson plan

**PowerPoints**

PowerPoints

Worksheets

Level 2 Diploma for Customer Service Practitioners

City & Guilds | SmartScreen

Unit 202 Scheme of work

Session	Objectives/learning outcomes	Activities and resources	Assessment
1 3 hours	<ul style="list-style-type: none"> <li>Be aware of the content of Unit 202</li> <li>Be able to locate the SmartScreen webpage</li> </ul> <p><b>Learning outcome 1:</b> 1.1 Identify the different regulations and legislation that affect own organisation</p>	<p><b>Activities:</b></p> <ul style="list-style-type: none"> <li>Discussion on the range of legislation and regulations that have an impact on customer service provision</li> <li>Completion of Worksheet 1</li> <li>Completion of Worksheet 2, Task 1</li> <li>Presentation of PowerPoint 1 including equality legislation video <a href="https://www.youtube.com/watch?v=UcuS5qlhNto">https://www.youtube.com/watch?v=UcuS5qlhNto</a></li> <li>Discussion of all legislation</li> <li>Discussion of customer charter examples</li> <li>Learners to review worksheets in pairs and make any amendments on basis of the other's experience and presentation</li> </ul> <p><b>Resources:</b></p> <ul style="list-style-type: none"> <li>Sample lesson plan 1</li> <li>PowerPoint presentation 1</li> <li>Worksheet 1</li> <li>Worksheet 2</li> </ul>	<p><b>Worksheet 1</b></p> <p><b>Worksheet 2</b></p>
2 3 hours	<p>Recap previous session</p> <p><b>Learning outcome 1:</b> 1.1 Identify the different regulations and legislation that affect own organisation</p>	<p><b>Activities:</b></p> <ul style="list-style-type: none"> <li>Review worksheets completed by learners during Session 1</li> <li>Discuss any issues raised</li> <li>Discussion on customer charters, service level agreements, ethics and morals, and codes of practice</li> <li>Presentation of PowerPoint 2</li> <li>Introduction of role play – Worksheet 3 (customer and employee briefs)</li> </ul>	<p><b>Worksheet 3</b></p>

# Enhanced SmartScreen



My Subjects > Customer Service > Level 2 Customer Service Practitioner

MY SUBJECTS CENTRE ADMIN REPORTS LOGOUT

SUBJECTS

Customer Service

**9794 Enhanced**

**9065**  
Intermediate Apprenticeship in Customer Service

**9065**  
Advanced Apprenticeship in Customer Service

**9065**  
Intermediate and Advanced Apprenticeship in Customer Service

**9794 Enhanced**  
Level 2 Customer Service Practitioner

**BUSINESS SKILLS**  
CUSTOMER SERVICE

**9794 Enhanced Level 2 Customer Service Practitioner**

This package contains a complete set of learner-facing materials as well as tutor materials.

**9794 Level 2 Customer Service Practitioner**

These learner-facing materials are based around the tasks in the Apprenticeship Training Manual (which are around the apprenticeship standard) but also contain video-based e-learning quizzes and knowledge content for learners to work through independently. They are made up of:

- dedicated content covering underpinning knowledge requirements
- structured tasks for learners to complete
- over 30 video-based e-learning quizzes on key concepts and which give learner feedback.

**2794 Level 2 Diploma for Customer Service Practitioners**

These tutor materials, which will be available in May 2018, have been designed to help tutors deliver either from non-mandatory qualification or directly from the apprenticeship standard. They offer:

- comprehensive schemes of work
- detailed PowerPoints
- worksheets
- practice questions
- a skills scan to check/ensure that each apprentice's job description matches the programme.

9794 Level 2 Customer Service Practitioner

**2794 Level 2 Diploma for Customer Service Practitioners**

**201** Developing self to achieve targets and goals

**202** Recognition of regulations and legislation within own organisation

**203** Principles of business

Customer service - Treating customers as individuals

Welcome to 'Treating customers as individuals'. The objective of this lesson is to understand how to treat customers as individuals, as well as how to provide a personalised customer service experience.

This is an important thing to learn because, as well as recognising and responding to individual needs, you must also ensure you are treating all customers equally and addressing their specific needs. Sometimes customers do not always give us the information we need in order to provide a personalised service. It is therefore important to know how to put customers at ease and give them the opportunity to 'open up' to you. It is also important to listen them - to their needs, desires and concerns and tailor your service to meet these.

**Finding out what they want**

Video index

Play all

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I have watched this video and want to take the quiz.

Quiz progress

1 2 3

Customer service - Treating customers as individuals

Play all

Quiz progress

1 2 3

... will help you to identify a customer's individual needs?

... one correct answer.

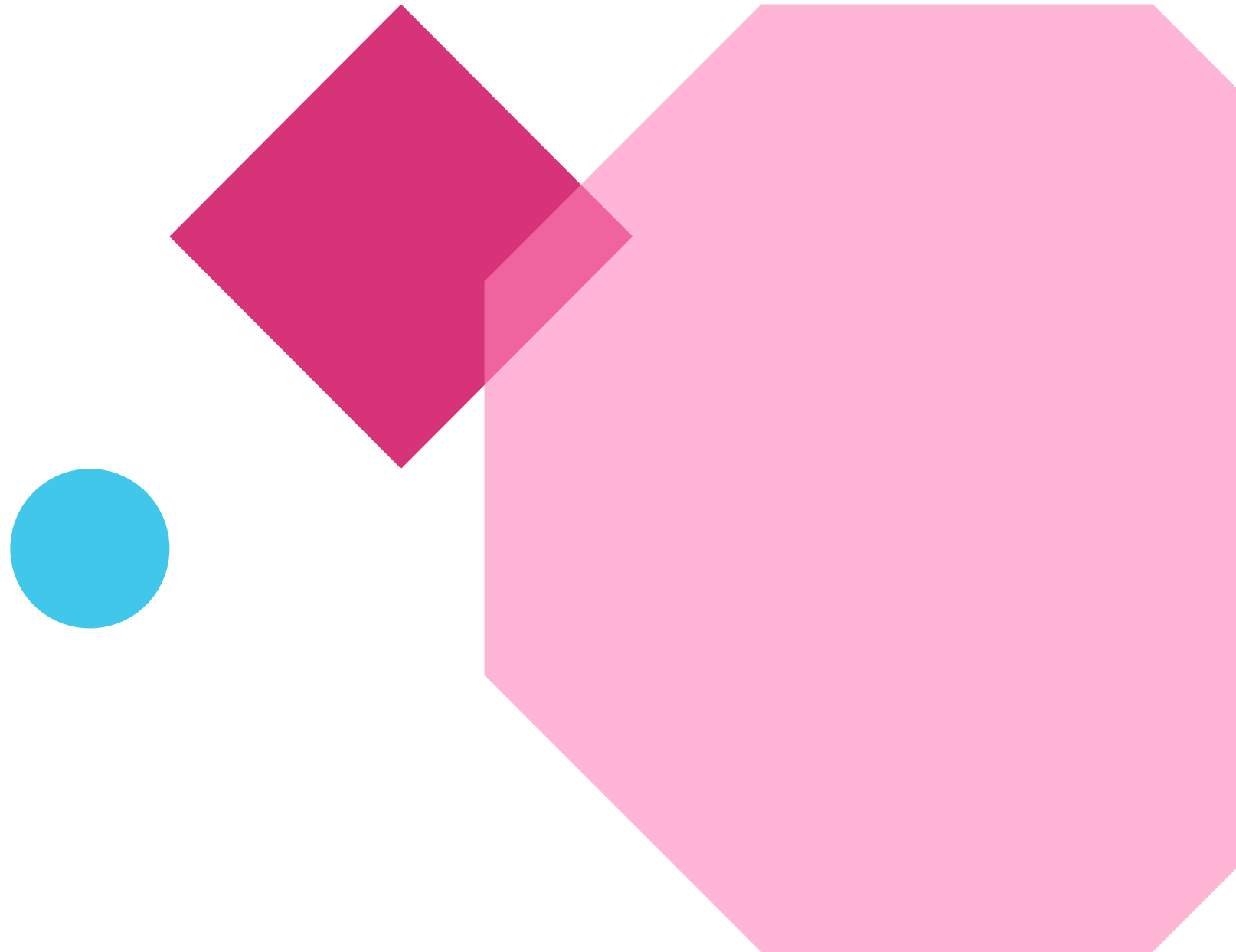
... judge

... g skills

... d listening skills

... availability of products

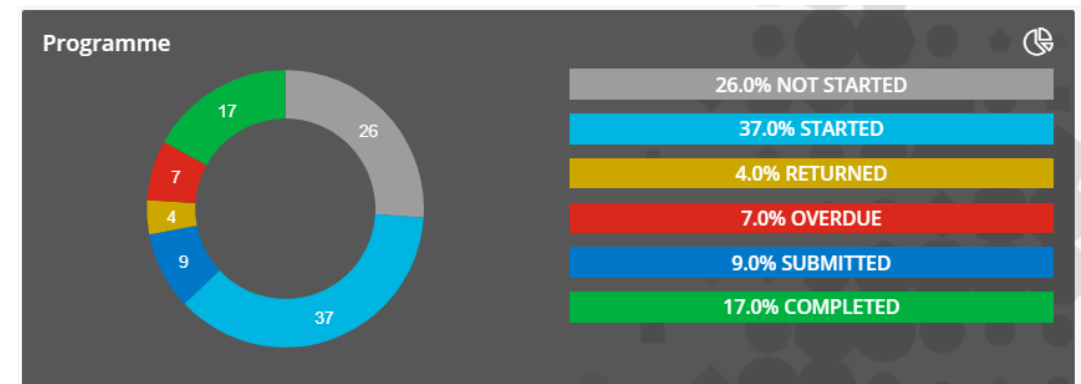
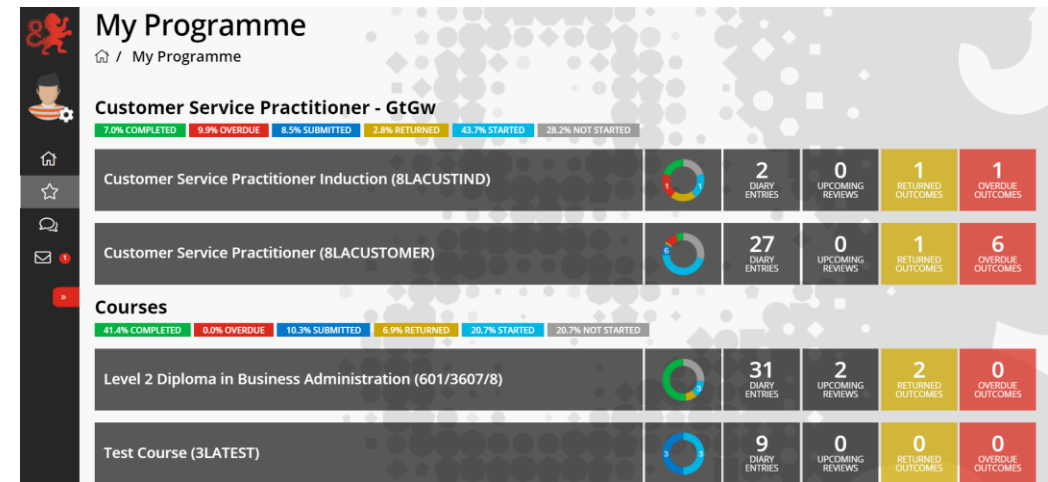
Submit



Get to gateway

# Get to gateway

- **Access on demand** using nothing more complex than a web browser.
- Apprentices use their **choice of device**, whenever and wherever they want to access learning.
- Assessors **engage online**, less time on the road means more time coaching.
- **Management reports** present accurate, up-to-the-second data on progress and funding.





# Structure and content

**Off-the-shelf** learning and assessment content for selected apprenticeship standards covering knowledge, skills and behaviours.

Use our “**out of the box**” resources and activities which are mapped to standards to teach **skills** and **behaviours**.

Course Evidence Registration Contact

8LACUSTIND - Customer Service Practitioner Induction (Incomplete) Course Display Gap Analysis Print

ALL 20.0% COMPLETED 20.0% OVERDUE 0.0% SUBMITTED 20.0% RETURNED 20.0% STARTED 20.0% NOT STARTED

Induction	Induction.1 Introduction	Induction.2 Your ILP	Induction.3 Reflective practice	Induction.4 Safeguarding and PREVENT	Induction.5 British values
STARTED	ACCEPTED 18 JAN 2018	RETURNED 18 JAN 2018	STARTED	STARTED	NOT STARTED

&lt;&lt; Return to Outcome

## Customer expectations

### Introduction

Understanding the difference between an external and an internal customer can be challenging at first. Customers are more than just those that use your organisation – they are also your work colleagues, who deserve equal politeness and a high level of customer service.



### Key terms

- **Customer expectations** – customer expectations are the benefits that a customer expects an organisation's products or services to deliver.
- **Customer needs** – something that customers must have as part of a product or service for them to purchase it. For example, a customer needs a lamp to adequately light the area intended.
- **Customer wants** – something that customers think would be 'nice to have' as part of a product or service, but is not necessary for them to purchase. For example, a customer might want to choose the colour of a lamp.
- **External customer** – someone outside the organisation who buys or receives products or services. External customers, except customers of organisations in the public sector, often have a choice and if they don't like your product or service can take their business elsewhere.
- **Internal customer** – can be a colleague, another department or a distributor you provide products or services to, which are used to create a deliverable for the external customer. Usually, internal customers don't have a choice of suppliers because they will be required to use the organisation's own products or services.

Attach additional evidence (5 files total)

### Question 2

Why is building good customer relations important to your organisation? What would be the consequences of getting this wrong? \*

Type your answers in the box below

### Question 3

Why is it important to balance the needs of an organisation and its customers? \*

Type your answers in the box below

# Customer Service Practitioner

Course	Topic	Task Page					
Customer Service Practitioner Induction	Induction	Introduction	Your ILP	Reflective practice	Safeguarding and PREVENT	British Values	
Customer Service Practitioner	Understanding the organisation	Organisation types	Task 1 Understanding organisation types	Task 2 Core values and service culture			
	Knowing your customers	Customer expectations	Task 3 Understanding customer expectations				
	Your role and responsibility and development	Personal development planning	Task 4 Creating a personal development plan	Professionalism	Task 5 Presenting a professional image	Feedback	Task 6 Using feedback from colleagues
		Personal organisation	Task 7 Organising, prioritising and monitoring your workload				
	Systems and Resources	Organisational systems and resources	Task 8 Using organisational systems and resources				
	Meeting regulations and legislation	Legislation and regulations	Task 9 Meeting legislation and regulations	Task 10 Health and safety	Task 11 Keeping information confidential		
	Equality	Equality, diversity and inclusion	Task 12 Treating all customers with equality and as individuals				
	Communication	Interpersonal skills	Task 13 Interacting effectively with customers	Establishing customers needs and expectations	Task 14 Providing a customer-focused experience		

# Customer Service Practitioner

Course	Topic	Task Page	
Customer Service Practitioner	Product and service knowledge	Products and services	Task 15 Knowing your products and services
	Using digital media	Digital and social media	Task 16 Using digital media
	Team working	Communicating effectively with colleagues	Task 17 Improving your customer service offer
	Dealing with customer conflict and challenge	Customer conflict and complaints	Task 18 Dealing with conflict
	End-point assessment *	Introduction	Apprentice showcase

\* NB End-point assessment task pages relate to C&G end-point assessment and are therefore only available to customers using C&G as their CSP EPO.

# Content examples – online resources including videos

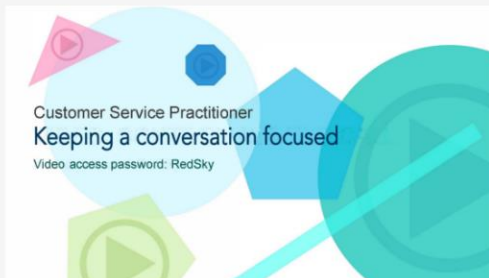
## Telephone skills



Great telephone skills are the building blocks of every business and it is easy to see why. Many of the important experiences that your existing, new and potential customers are having are based upon the level of customer service they are receiving from you and your colleagues whilst on the phone. Employees who can use their telephone skills to effectively deliver excellent service will grow and maintain a thriving business.

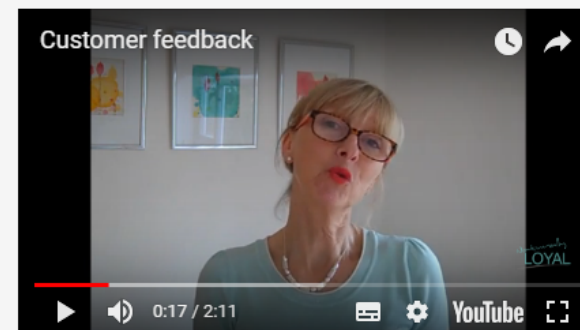
Ways in which you can improve your telephone skills include, controlling your call by sticking to a structure, asking open questions when you need to and showing that you are listening. Record and repeat information so the caller feels connected.


Select the image to launch the e-learning below – to access the video you will need to enter the password **RedSky**.



## Customer feedback

Customer feedback is an important tool in evaluating and **improving customer service**. Watch this video to learn more about the importance of customer feedback and then select the book below to learn more.



 **Gathering customer feedback**



# Content examples – preparatory activities and case studies

## Case study 1

Read the case study below and then answer the questions that follow.

You are working in the reference section of the public library. A customer who is new to using computers repeatedly approaches you to help her to set up an email account. She has no idea how to do it because she has never used a computer. As you are not busy, you provide her with help for a few minutes. A queue begins to form at your desk and you have to leave to attend to other customers. The woman then loudly complains about the lack of service at the library.

### Question 1

How would you identify this customer's expectations?



Type your answers in the box below

### Question 2

How could you manage this customer's expectations?



Type your answers in the box below

## Preparatory activities

### Question 1

In your own words, explain the differences between features and benefits, using examples from the products and/or services offered by your organisation.



Type your answers in the box below

### Question 2

In your own words, explain the differences between products and services. If your organisation sells both products and services, you should provide specific examples to help you demonstrate the differences.



Type your answers in the box below

# Roles

Administrators:

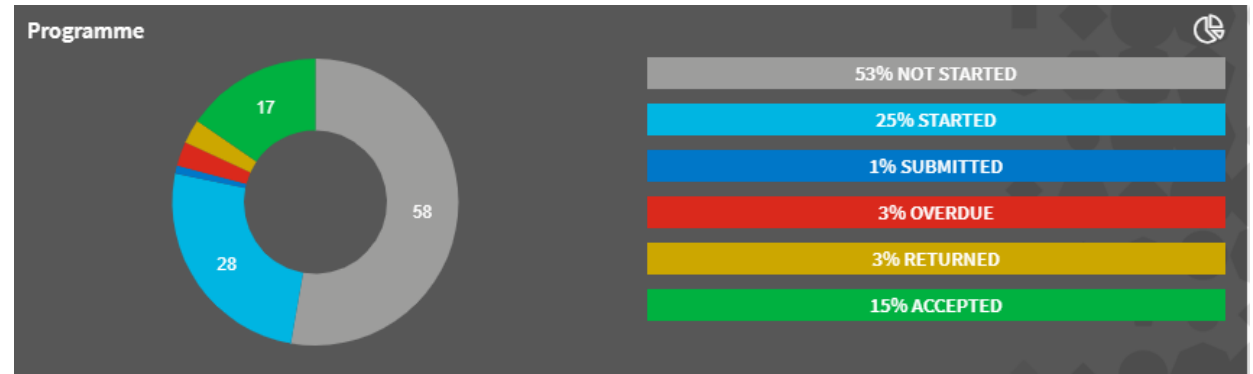
- create **team members**
- create **learners**
- create **employer** access
- run **reports**.

Assessors, tutors and internal quality assurers (IQAs):

- **planning** and guidance
- **reviewing** the completed tasks and giving feedback
- **supporting** the apprentice through the on-programme phase.

Apprentices:

- access the **learning content** and complete their tasks
- record any **off-the-job training**.



Assessors	★	Anna Clark
Verifiers	★	Kirsty Jones

Role	Role.1	Role.2
Your role and responsibility and development	Personal development planning	Task 4 Creating a personal development plan
STARTED	STARTED	ACCEPTED 08 MAR 2018

# 20% off-the-job

- Apprentices and assessors can easily create contact diary entries and record their **off-the-job training**.
- Diary entries are **date stamped** and have the embedded **electronic signature** of the person who recorded the entry. Documents and evidence can be uploaded as part of the entry if required.
- A apprentice, employer or assessor could be asked to **acknowledge the entry**.
- **Reports** can be accessed by the employer, assessors and administrators on either individual apprentices or groups of apprentices.

Contact Diary  
Update Diary Entry

City & Guilds Learning Assistant

Entry

Description

Presentation Skills - e-learning

Feedback

I went through the elearning module for 'Presentation Skills' on SkillsZone.

- I learnt the importance of understanding the audience
- Having clear objectives and outcomes for the presentation
- Having clear and simple slides
- Practice the pace and timings
- Speak slowly and clearly
- Allow time for questions

On the Job Training Hours 0 Minutes 0

Off the Job Training Hours 1

Related Documents

Upload

Delete Copy

Metrics

Displaying 1 to 10 of 10 Entries

25 per page

1 of 1

DATE CREATED	DESCRIPTION	CREATED BY	ON THE JOB TRAINING	OFF THE JOB TRAINING	ACTION
12 Dec 2017	Presentation Skills - e-learning	Henry Smith (Candidate)	0:00	1:15	View
11 Dec 2017	Workplace Skills Training	Anna Clark (Primary Assessor)	0:00	1:45	View
11 Dec 2017	Inhouse Training	Anna Clark (Primary Assessor)	1:30	0:00	View
30 Nov 2017	recording of on the job learning	Henry Smith (Candidate)	3:00	0:00	View
31 Oct 2017	Element 102.1 Returned	Anna Clark (Primary Assessor)	0:45	1:00	View
07 Sep 2017	Induction to company	Anna Clark (Primary Assessor)	5:00	0:45	View
21 Jul 2017	recording on the job	Anna Clark (Primary Assessor)	3:30	7:00	View
26 Apr 2017	webpage design	Anna Clark (Primary Assessor)	1:00	0:00	View
22 Feb 2017	Element 101.1 Returned	Anna Clark (Primary Assessor)	7:30	5:30	View
09 Feb 2017	GLH recording	Anna Clark (Primary Assessor)	40:45	36:15	View
<b>Totals</b>			63:00	53:30	

# Learner manager

Assessors can easily manage their caseloads with a **quick overview** of their apprentice's portfolios.

**Unit status** is easily reviewed and both the 'started' and 'completed' progress' bars will be visible.

The screenshot shows the 'Learners' management interface. At the top, there are navigation buttons: 'Create Learner', 'Learner Feedback', 'Group Enrolment', and 'Cohort Manager'. A search bar is available for finding learners. The main area displays a table of learners for the course '500/6355/8 - Diploma - NEW PREMIUM - Level 2 NVQ Diploma in Hairdressing (3008-02)'. The table includes columns for 'LEARNER / COURSE', 'UNITS', 'RAG', 'STARTED', 'COMPLETED', and 'ACTIONS'. Each learner's row shows their name, profile picture, and a grid of unit status buttons (e.g., G20, G17, G7, GH8, GH9, GH10, GH11, GH12). Progress bars and completion percentages are shown for each learner. A sidebar on the left contains various navigation icons. The footer includes 'Terms & Conditions', 'Customer Support', 'Feedback', 'Logout', and 'Copyright City & Guilds - Learning Assistant ©2006-2017'. The 'City & Guilds Learning Assistant' logo is in the bottom right corner.

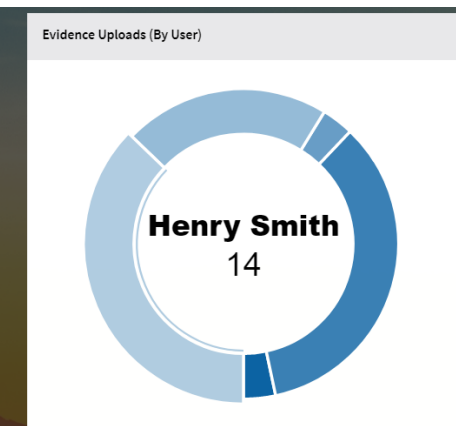
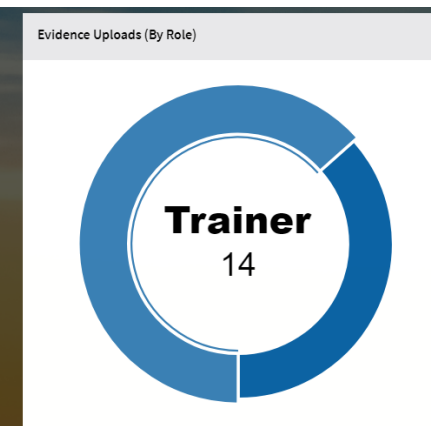
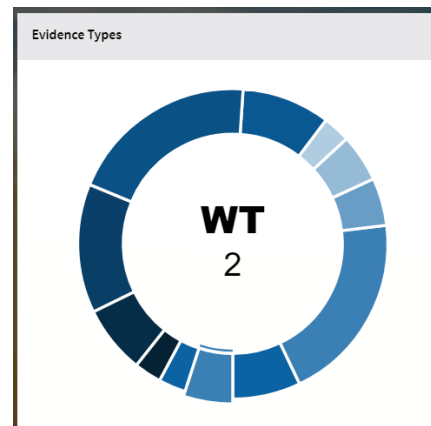
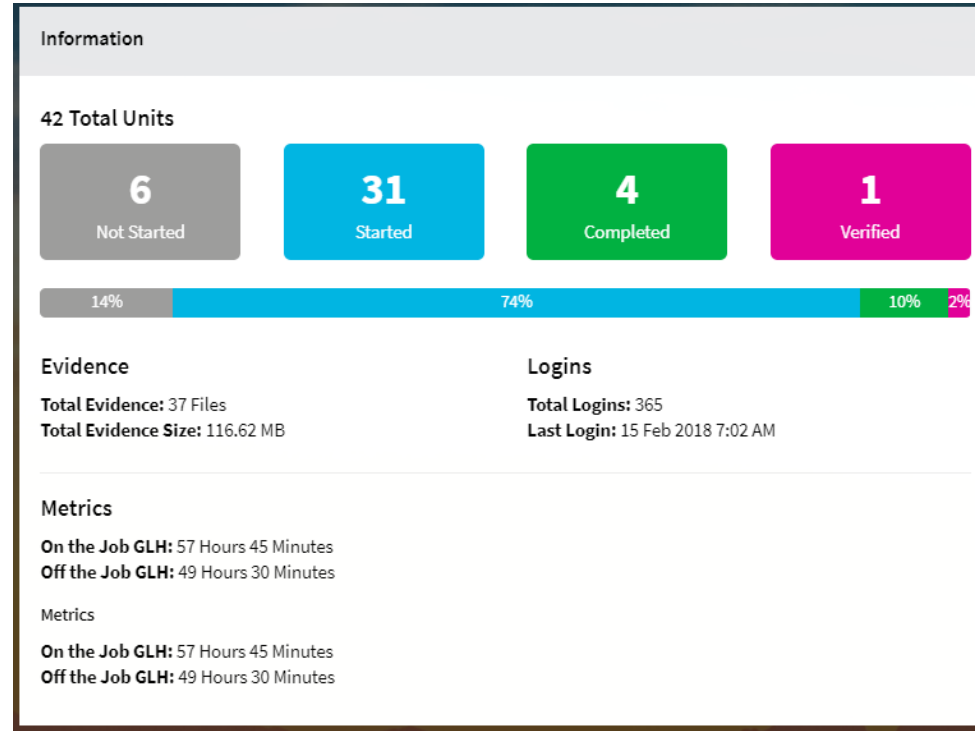
LEARNER / COURSE	UNITS	RAG	STARTED	COMPLETED	ACTIONS
Adams, Maggie India	G20 G17 G7 GH8 GH9 GH10 GH11 GH12	●	Started 0%	Completed 0%	Action
Copper, Hannah City & Guilds	G20 G17 G7 GH8 GH9 GH10 GH11 GH12	●	Started 0%	Completed 0%	Action
Ford, Shelly T4	Intro Hair G20 G17 G7 GH8 GH9 GH10 GH11 GH12 G8 G18 GH15	●	Started 8%	Completed 0%	Action
James, Tracy T4	Intro Hair G20 G17 G7 GH8 GH9 GH10 GH11 GH12 G4 G8	●	Started 81%	Completed 11%	Action
Lane, Penny T4	G20 G17 G7 GH8 GH9 GH10 GH11 GH12 G4 GH15	●	Started 70%	Completed 63%	Action
Rennie, Michelle T4	G20 G17 G7 GH8 GH9 GH10 GH11 GH12 G4 G8 GH15	●	Started 81%	Completed 27%	Action
Rosin, Amber T4	G20 G17 G7 GH8 GH9 GH10 GH11 GH12 G4 GH13 GH14	●	Started 0%	Completed 0%	Action



# Reporting

**Standard progress reporting** will be available for assessors and administrators.

**Progress and activity reports** can be scheduled and extracted in various formats.



# Digital credentials

Embedding assessment

## On-programme assessment

Customer Service  
Customer Service Practitioner

Communication Skills  
Customer Service Practitioner

Conflict & Challenge  
Customer Service Practitioner

Self-Development  
Customer Service Practitioner

Personal Organisation Skills  
Customer Service Practitioner

Using Systems & Resources  
Customer Service Practitioner

Team Working  
Customer Service Practitioner

Understanding your Organisation  
Customer Service Practitioner



## EPA

City & Guilds  
CUSTOMER SERVICE PRACTITIONER  
End-point assessment  
DISTINCTION

City & Guilds  
CUSTOMER SERVICE PRACTITIONER  
End-point assessment  
PASS

Achieve any time before EPA

Maths & English  
Level 2

# Level 2 Diploma for Customer Service Practitioners

Embedding  
assessment

## Qualifications to support on-programme learning – now live

- Level 2 Diploma for Customer Service Practitioners (2794).
- Mapped 100% to the Customer Service Practitioner standard.
- Mapping document available.
- Resources available on SmartScreen.

Level 2 Diploma for Customer  
Service Practitioners (2794-02)

Version 1.1 (October 2017)

Qualification Handbook

# New qualification – 2794 Level 2 Diploma for Customer Service Practitioners – mandatory

- Mapped to the standards.
- Pass/fail.
- Can use evidence that may have been gathered for the summative portfolio – but not the same.

## Mandatory units – 201 to 206.


City & Guilds number	Unit title	GLH	TQT
201	Developing self to achieve targets and goals	30	60
202	Recognition of regulations and legislation within own organisation	30	45
203	Principles of business	27	47
204	Contribute to a customer focused experience	38	68
205	Provide customer service	28	68
206	Manage customer expectations	28	68

# New qualification – 2794 Level 2 Diploma for Customer Service Practitioners – optional

**Must complete 1 Optional Unit – 207 to 213.**

City & Guilds number	Unit title	GLH	TQT
207	Working in a sales environment	25	50
208	Working in an administrative environment	27	55
209	Working in a contact centre environment	25	53
210	Customer service principles (multi-choice test)	25	53
211	Working in a retail environment	22	52
212	Social media in a work environment	30	55
213	Fundamentals of marketing	26	52

# Maths and English – what can we offer?



Embedding  
assessment

## Qualifications

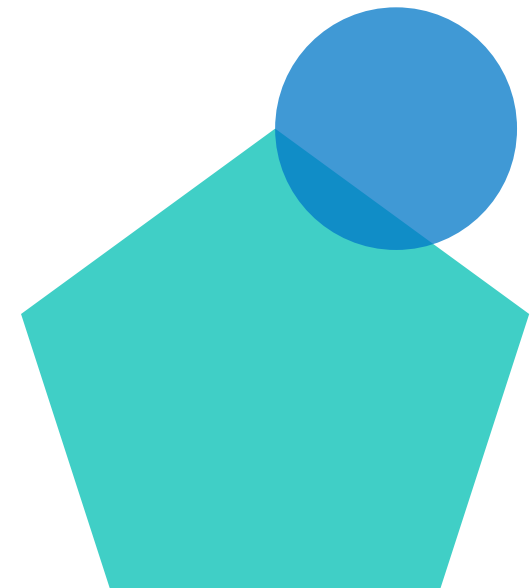
- Full suite of Functional Skills qualifications (3748).
- ‘Bite-sized’ maths qualifications (3847 and 3844).
  - Can be used to support progression towards Functional Skills or GCSE.

## Learning resources

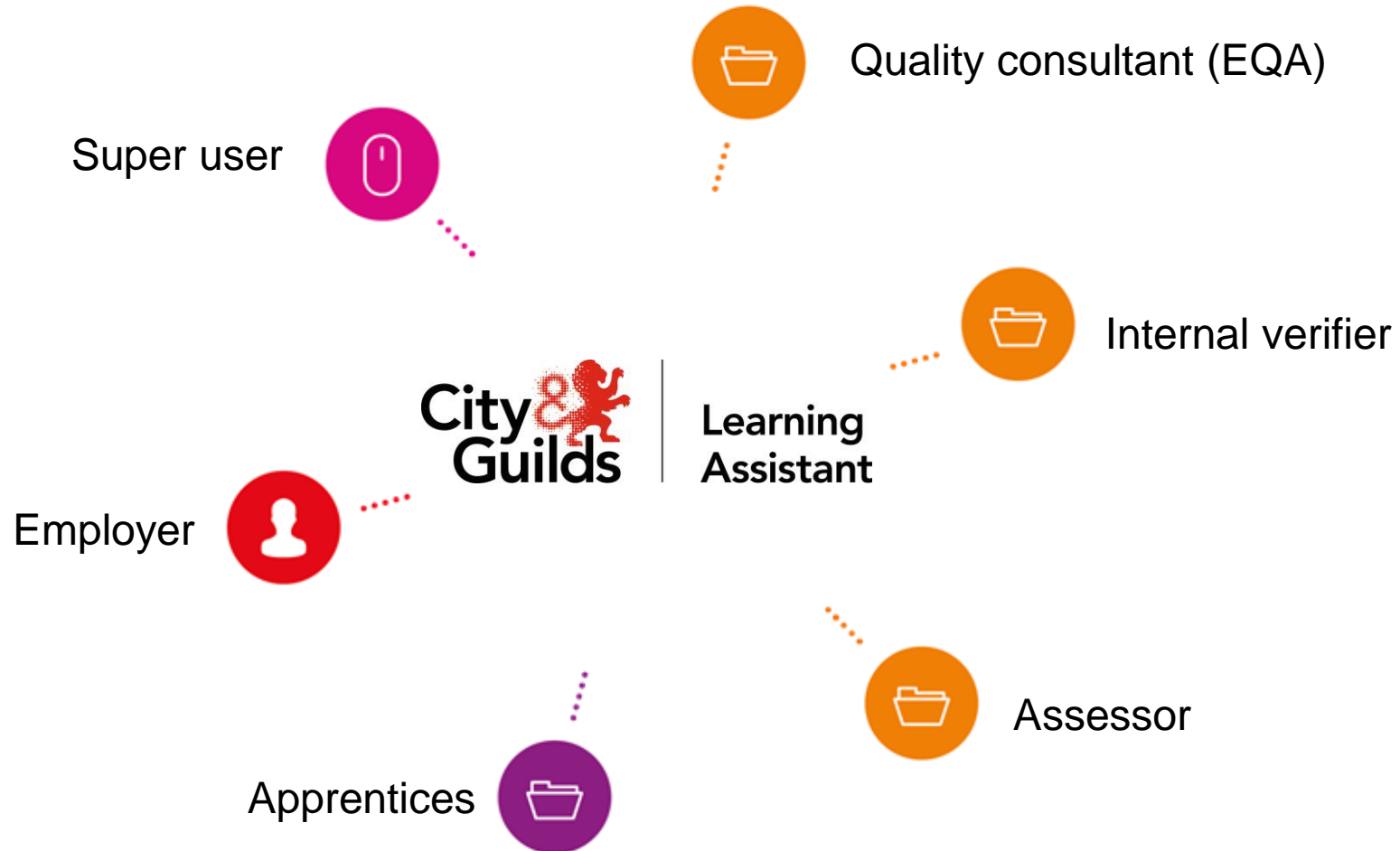
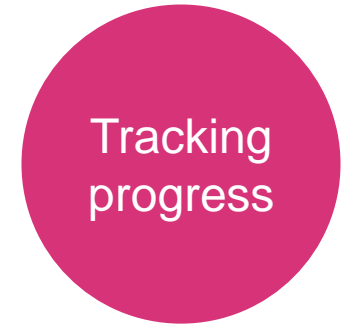
- e-Functional Skills.
- Maths and English e-Toolkit.
- Functional Skills SmartScreen resources.

## Workforce support

- Qualifications for literacy and numeracy practitioners.
- Specialist support, especially with maths and English integration.



# Embedding assessment and monitoring progress with our e-portfolio



# e-portfolio – embedded resources

Tracking progress

Your Learning Assistant licence lets you have access to some of the most popular City & Guilds apprenticeship training manuals **for no additional charge.**

Using this manual	4
How the Customer Service Practitioner programme works	6
Customer Service Practitioner standards	9
How the standards map to the tasks	16
Task progress checklist	18
Reflective practice – making the most of your learning	19
<b>Task 1: Induction part one – Understanding organisation types</b>	<b>29</b>
Task 2: Induction part two – Understanding customer expectations	39
Task 3: Creating a Personal Development Plan	51
Task 4: Presenting a professional image	69
Task 5: Using feedback from colleagues	83
Task 6: Organising, prioritising and monitoring your workload	93
Task 7: Using organisational systems and resources	107
Task 8: Meeting legislation and regulations	117
Task 9: Treating all customers with equality and as individuals	135
Task 10: Interacting effectively with customers	147
Task 11: Providing a customer-focused experience	169
Task 12: Knowing your products and services	183
Task 13: Using digital media	199
Task 14: Improving your customer service offer	207
Task 15: Dealing with conflict	221
Glossary of key terms	241

The screenshot shows a user interface for tracking task progress. It features three task cards:

- Task1 - Induction part one - Understanding your organisation:** Status: NOT STARTED. Progress: 0% (Started 0%, Completed 0%).
- Task2 - Induction part two - Understanding customer expectations:** Status: Started. Progress: 100% (Started 100%, Completed 0%).
- Task3 - Creating a personal development plan:** Status: NOT STARTED. Progress: 0% (Started 0%, Completed 0%).

Each task card includes a 'Release' button, an 'Exclude' button, and a 'Set Deadline' button.



# EPA preparation tool – helping your apprentice calmly approach EPA



Personalised to each apprentice with up to six hours of generic content per standard


Useful and relevant learning resources relevant to the standard and assessment method

Organised by assessment skills most relevant to the apprentice and to the standard


Apprentices can gain confidence in areas like interviews, presentation skills, writing and exam revision

The collage displays various components of the EPA preparation tool. It includes an article from 'Which?' titled 'How to perfectly present your portfolio at interview', a graphic with '3 TIPS TO BOOST YOUR CONFIDENCE', and a 'SmartScreen' interface for the 'CG0483 Customer Service Practitioner' standard. The SmartScreen interface shows a 'SUBJECTS' list with 'End-point assessment preparation' and 'CG0483' highlighted, along with other subjects like 'CG0231 Digital Marketeer' and 'CG0385-02 Hairdressing Professional: Barbering Route'.

# City & Guilds EPA service



Calibre and expertise of assessors



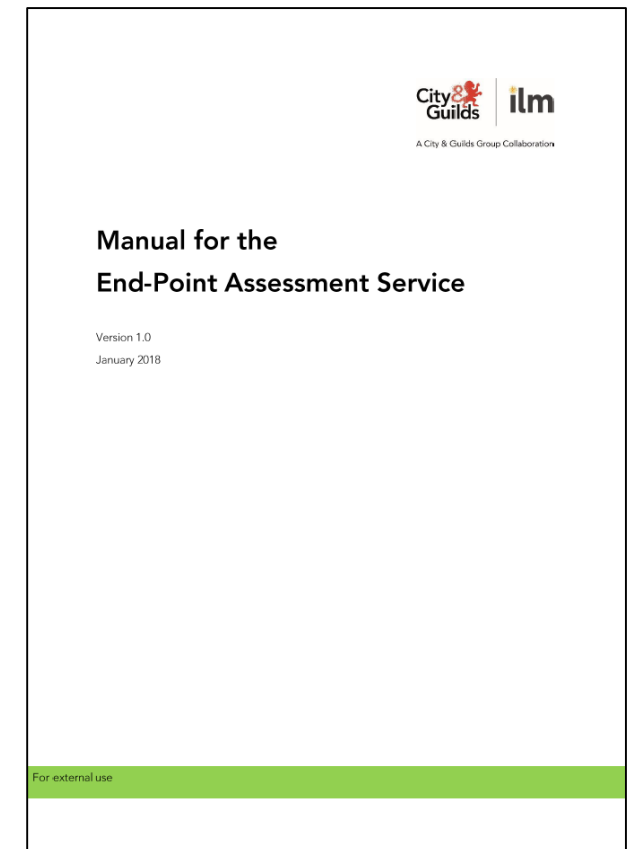
Preparation to pass first time




Smooth process with clear structure

[Manual for City & Guilds and ILM EPA service.](#)

[Catch up on our recent webinar on the EPA booking process and support on assessment methods.](#)



# Preparation at the heart of our service



EPA customer packs for every standard



City & Guilds

Level 2 Customer Service  
Practitioner (9794-02)

May 2017 Version 1.0

End-Point Assessment Pack

For Centres/End-Point Assessment Customers/Employers

Key document for centres/customers/employers for the planning and delivery of the apprenticeship.

It will include:

- the standard
- guidance on how to book EPA
- guidance on how to prepare for the showcase portfolio, practical observation and professional discussion and how they will be assessed – against relevant sections of the assessment methods and grading criteria (annex)
- guidance on examples of possible evidence
- separate pack with recording forms.

We can also support with subject specific on-programme learning. Find out more at <https://www.cityandguilds.com/apprenticeships/on-programme-learning>.

# EPA for Customer Service Practitioner



**Apprentice showcase**

Submit on the  
EPA portal.



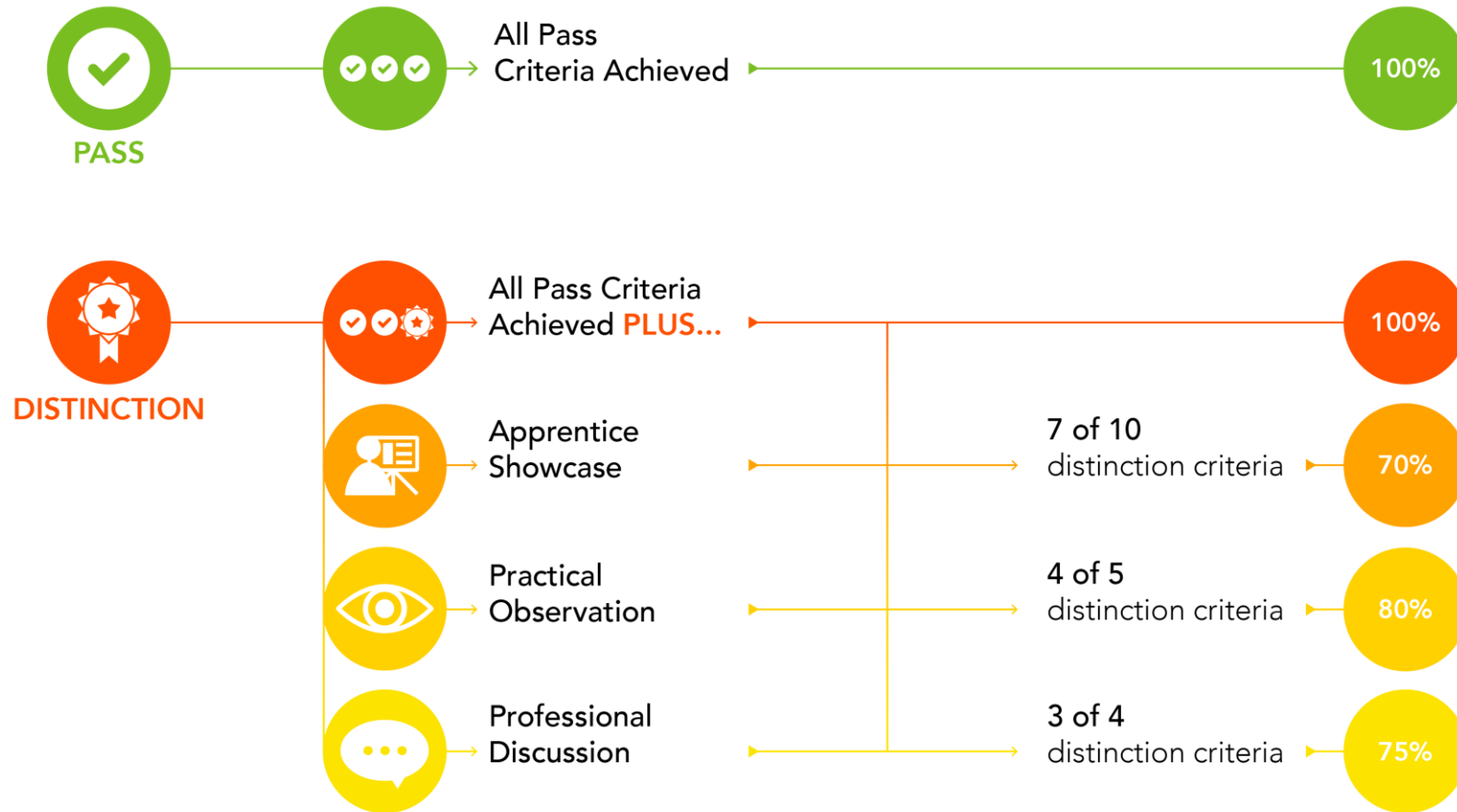
**Practical observation**

Face-to-face at the employer's premises.



**Professional discussion**

# EPA and overall grading



# Entry requirements for EPA

- A customer service practitioner apprentice must have achieved Level 1 maths and English and attempted Level 2 before taking EPA .
- Gateway can be triggered after 12 months of starting the apprenticeship.
- Complete gateway declaration form.
- Book EPA 60-90 days in advance of EPA taking place.
- Pre-gateway – learning progress to be supported by regular one-to-ones between the apprentice and the employer. Typically meet every six weeks for 30 minutes to review progress. These sessions should:
  - set learning goals
  - track apprentice progress
  - create a forum for coaching and guidance
  - co-ordinate 20% of apprentice time spent in off-the-job training.

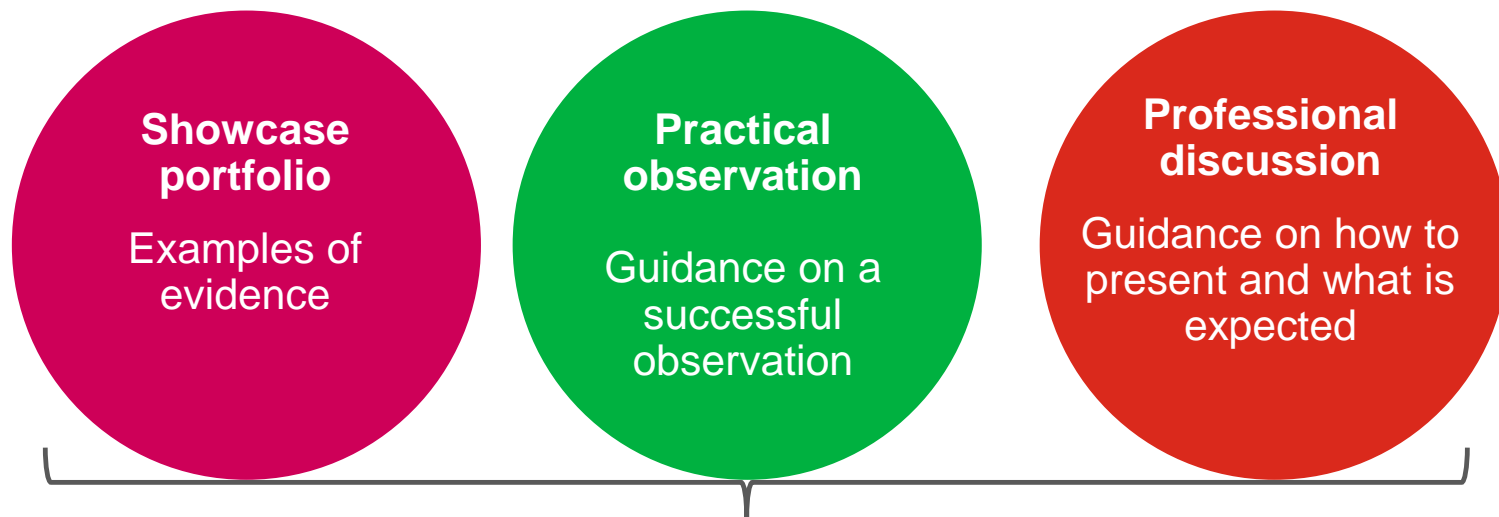
# Our EPA service

- Simple pricing – two charging points:
  - EPA registration fee – non-refundable £25 when the apprentice is registered for EPA on City & Guilds system
  - balance – after assessor enters results.
- The registration fee releases our EPA preparation tool and any related materials during the on-programme learning phase.
- You'll have received nearly all of your funding from employers by this point so helps cash flow.
- No hidden charges – includes any third-party fees related to external quality assurance.



# EPA exemplar material

- Aimed at the assessor/tutor.
- Easy to access.
- Standard specific.
- Best practice guidance for relevant EPA components.



Underpinned by overarching tutor notes to pull all the different elements together



# Results and resits

If the apprentice passes, then we will issue a 'Statement of Achievement' to the customer.

We then claim the apprentice certificate from the Institute of Apprenticeships who in turn, post certificates to the employer.

If the apprentice fails, we will issue a formal notification and feedback to the customer on which areas were failed.

Booked through Walled Garden on a component by component basis. City & Guilds reopens access for the apprentice's EPA portal record or gives them a resit course.



# Our assessors

- We've recruited over 100 high-quality assessors across a range of standards.
- Our assessors are industry experts.
- We train them to help apprentices feel relaxed and show their best in assessment.

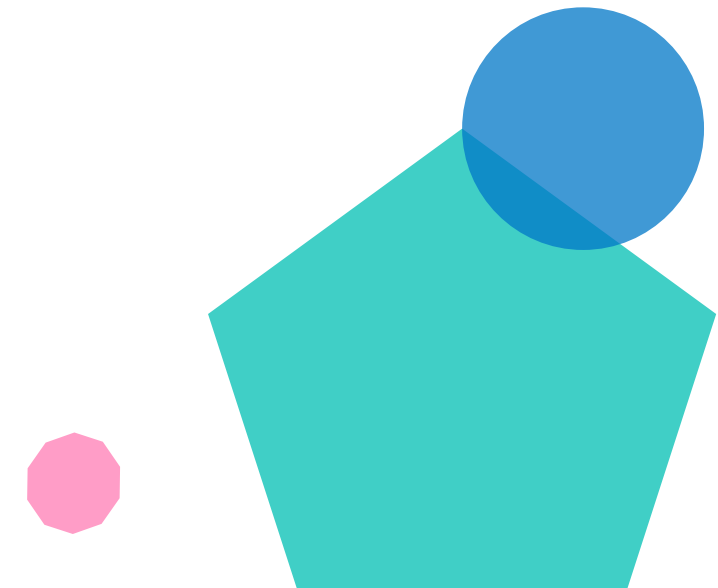
## Join our assessor team:

- For a list of standards that we're recruiting in, visit our [IEPA assessor page](#).



# Next steps

- EPA live.
- Skills-scan.
- Sample tasks and tutor resources.
- EPA exemplar pack.
- Network events.
- Webinars – modular.



# Further support and events from us

[Mandy.Slaney@cityandguilds.com](mailto:Mandy.Slaney@cityandguilds.com)

[Dominic.Green@cityandguilds.com](mailto:Dominic.Green@cityandguilds.com)

**Sign up for our new events and watch our pre-recorded webinars** on EPA, funding, on-programme resources:

<https://www.cityandguilds.com/apprenticeships/events-and-webinars>

## **Network events**

We are always looking for centres to help us host a network event. Please contact us if you're interested.



- Connect with Mandy on Linked in [here](#).

# Thank you

## Customer queries

Please contact your local business manager.

## General apprenticeship enquiries

Please contact [apprenticeships@cityandguilds.com](mailto:apprenticeships@cityandguilds.com).

Keep up to date – register for email updates:

<http://www.cityandguilds.com/what-we-offer/centres/email-updates>.

For more information on the new standards, our learning resources (including demos), and how we can support your business: [directsales@cityandguilds.com](mailto:directsales@cityandguilds.com).



Any questions?

