

Level 3 Customer Service Specialist EPA

Customer Service Specialist Overview (9494)

April 2022

Dom Green

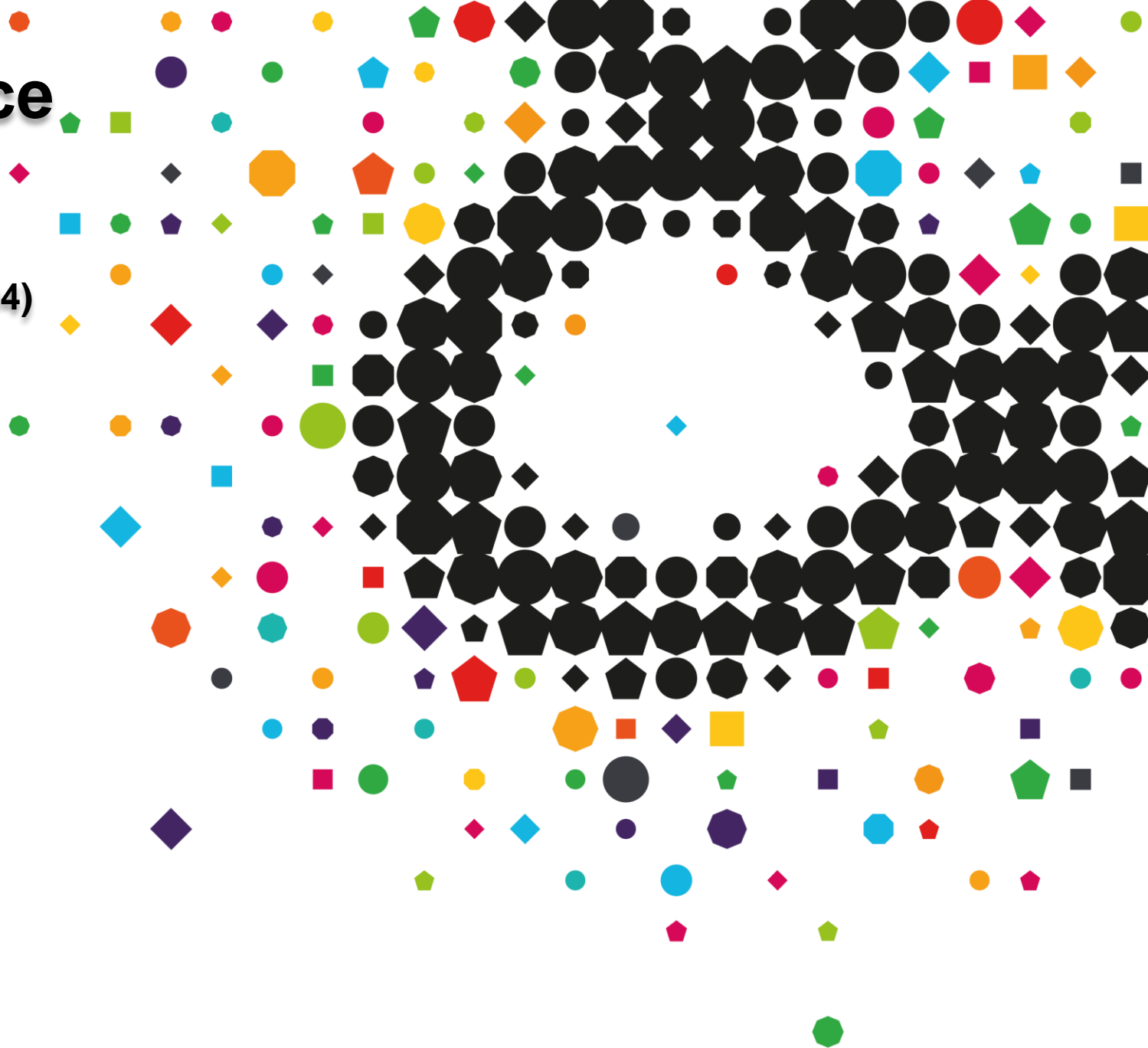
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Using the webinar platform



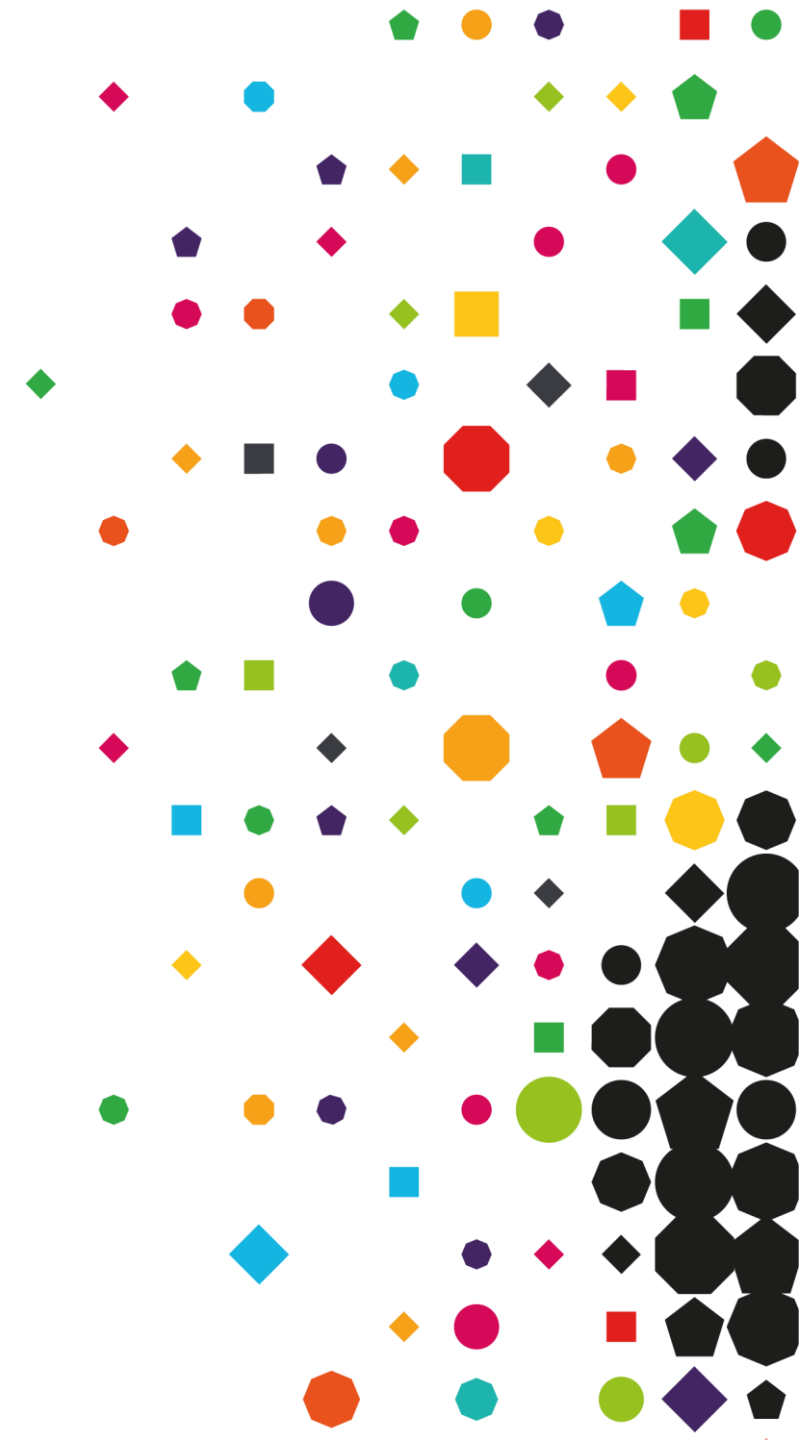
Send any questions in the question area throughout the webinar



All attendees will be set to mute



Webinar recording will be shared on our website shortly after and sent to you directly via follow up email.



Objectives of today

Brief overview of the standard inc weighting and grading
PD based portfolio

Today's focus is on:

Project proposal

Witness testimony dispensation

New supporting guidance



This webinar is being recorded and will automatically be sent to every attendee no later than tomorrow.



Customer Service Specialist Level 3

EPA for Customer Service Specialist



(Portfolio based)
Professional
Discussion



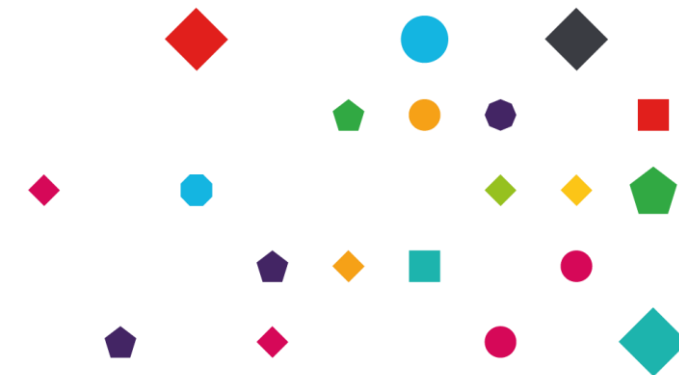
Work based project – interview



Practical observation/Witness Testimony
(with Q&As)

Face to face EPAs

It is strongly recommended that the **observation** is carried out **after** the portfolio based professional discussion





The EPA consists of 3 components:

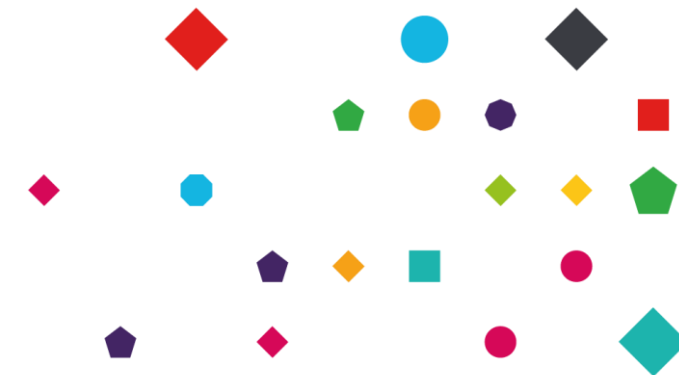
- Professional Discussion supported by Portfolio of Evidence (701/751)
- Work based Project, supported by Interview (702/752)
- Practical Observation supported by Q&A / Witness Testimony with Q&A (703/753)

The components contribute towards the overall grade as follows:

Assessment Method	% Contribution
Professional Discussion supported by Portfolio of Evidence	25%
Work based Project supported by Interview	30%
Practical Observation supported by Q&A / Witness Testimony with Q&A	45%

Preparing for Gateway

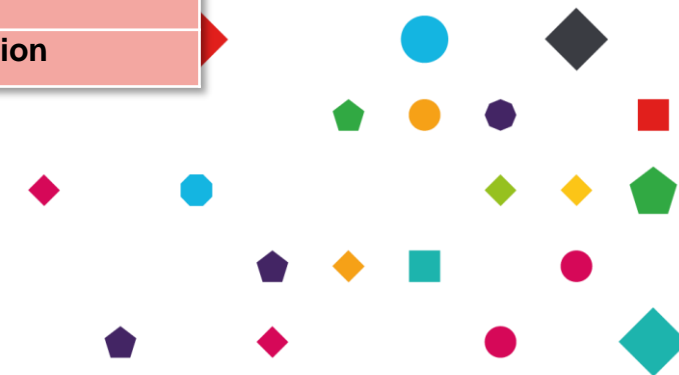
- Achieved Level 2 maths and English.
- Evidence of the relevant customer service knowledge, skills and behaviours as set out in the standard.
- Portfolio of evidence - minimum of 10 pieces of evidence – Maximum of 15 pieces.
- Prepared project proposal for consideration.
- Project time frame only starts once the proposal has been accepted.
- Witness testimony to confirm competency (if remote EPA).



End-point assessment (EPA) & Grading

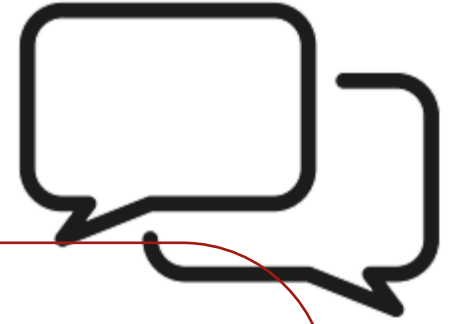
Grading

(Portfolio based) Professional Discussion	Work based project – interview	Practical observation/Witness Testimony (with Q&As)	Overall grading
Pass	Fail	Fail	Fail
Fail	Fail	Pass	Fail
Fail	Pass	Fail	Fail
Pass	Pass	Pass	Pass
Distinction	Pass	Pass	Pass
Pass	Distinction	Pass	Pass
Pass	Pass	Distinction	Pass
Distinction	Distinction	Pass	Pass
Pass	Distinction	Distinction	Pass
Distinction	Pass	Distinction	Pass
Distinction	Distinction	Distinction	Distinction



Professional discussion supported
by portfolio of evidence.

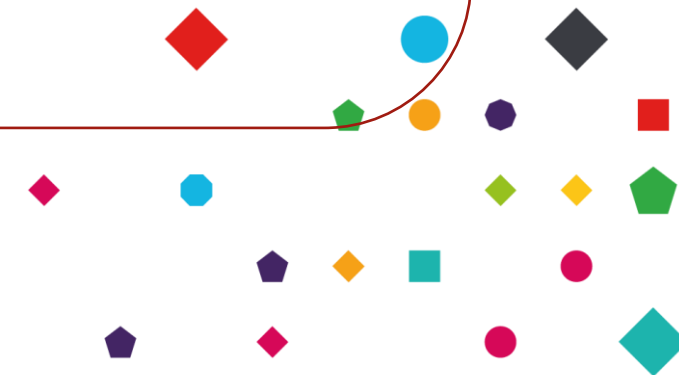
Portfolio of evidence



- Minimum of 10 pieces of evidence – Maximum of 15 pieces.
- Submit 2 weeks prior to EPA.
- Evidence not directly assessed – used for planning of the PD.
- Usual collection of apprentice's **best** forming a **holistic** overview.
- Submitted electronically to the City & Guilds e-portal.
- Examples include: Witness statements, customer feedback, manager feedback, reflective accounts, PDPs, CPD log, presentations, observations, report on e.g. complaints handling etc.

Does the evidence selected follow the below:

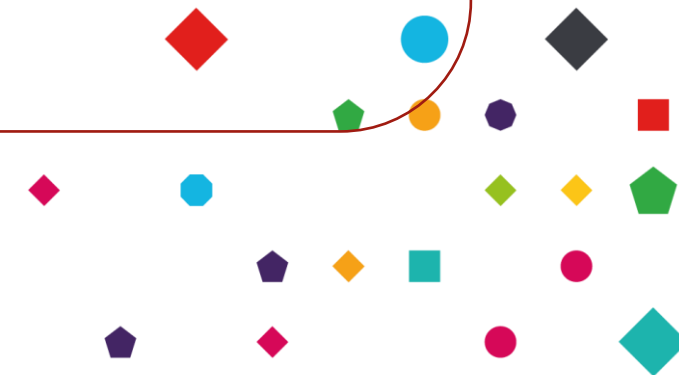
1. Which pieces holistically (most efficiently) give evidence that together cover all of the relevant criteria?
2. Is this the best evidence I have, showing that I have met all of the requirements for the distinction grade?



Portfolio of evidence

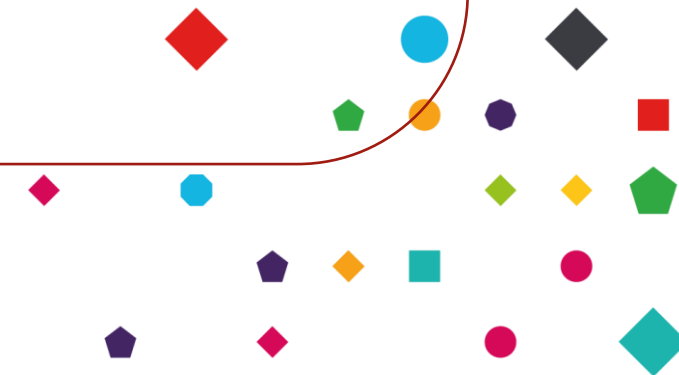


- Cross-reference each criterion to the relevant piece of evidence.
- Formally declare the authenticity of all evidence.
- Face to face or remote.
- Conducted in a suitable controlled environment.
- Ideally conducted on the same day .
- Duration is 60 minutes (10% tolerance).



LIEPA Feedback

- Portfolio evidence reference form.
- Reference evidence
- Audio recordings
- Does the evidence holistically map?
- Anonymise customer information.
- Prepare the apprentice
- Portfolio is a support mechanism during the PD
- Distinction criteria.
- Quality assurance

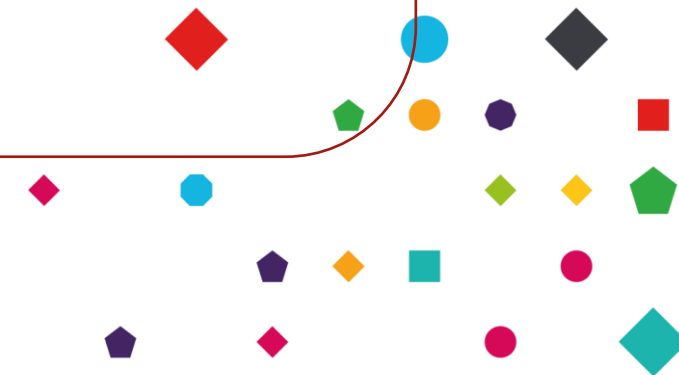


Key Criteria - Professional discussion supported by portfolio of evidence

- **Developing Self**

- Proactively keep your service, industry and best practice knowledge and skills up-to-date.

*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.*

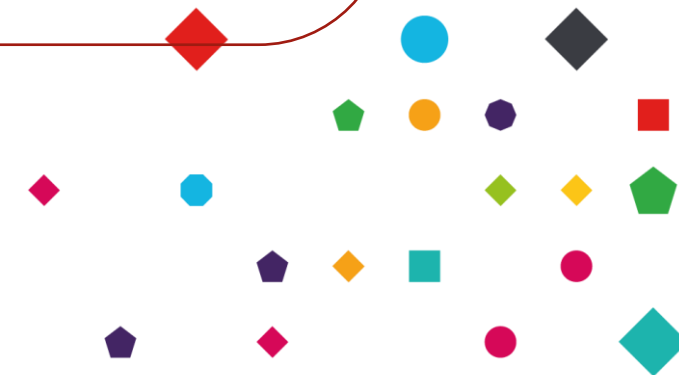


Practical observation/Witness Testimony (with Q&As)

Practical observation (with Q&As)



- must include customer interaction
- ***undertaking a range of day to day workplace activities in the apprentice's workplace***
- ***interaction with at least 3 different customer types (customers with varying needs)***
- importance of time of day the observation takes place at
- supplementary Q&A may be carried out to seek further clarification on aspects not seen during the observation
- time allowed 60 minutes (10% tolerance)

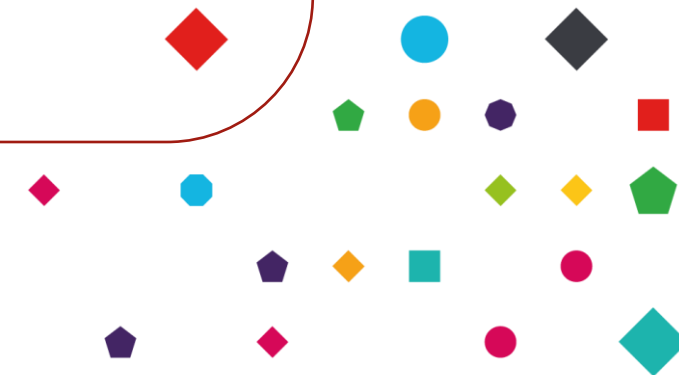


Witness testimony dispensation (with Q&As)



Provider support and involvement

- Supporting the employer – employer must complete but can be offered support.
- Discuss the evidence with the employer, provider and apprentice.
- Good practice to carry out mock Q&A sessions with apprentice.
- Audio WT can be effective but must be carefully planned.
- Ensure the witness testimony covers all the criteria.
- It is the providers responsibility to check the WT meets the required criteria for the observation.
- The witness testimony should cover **ALL** of the pass (**AND** distinction criteria **if possible**)
- The witness testimony must showcase the apprentice's skills.
- The Q&A which follows, lasts a maximum of 30 minutes.
- Dispensation ends 30th June 2022

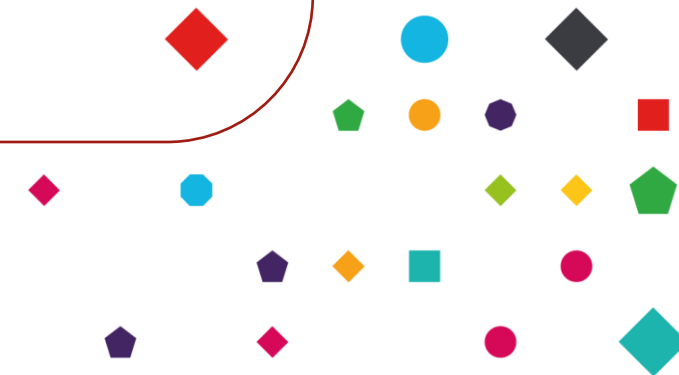


Witness testimony dispensation (with Q&As)



Employer support and involvement

- Supporting the employer – employer must complete but can be offered support.
- Bring in the apprentice
 - The involvement of apprentices in identifying evidence is paramount.
- Seeing greater use of audio recordings
 - See guidance document for using audio

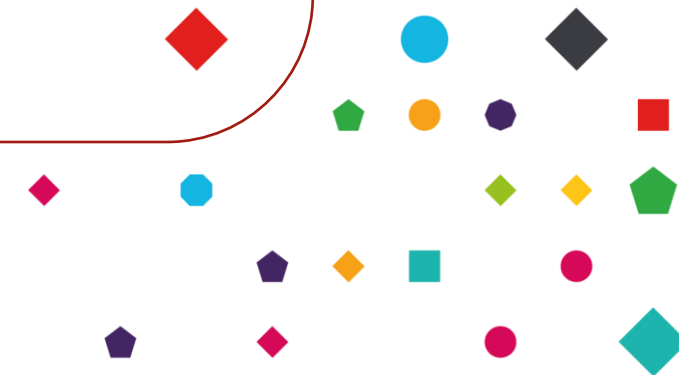


Witness testimony dispensation (with Q&As)




Employer support and involvement – New employer guidance

- We are creating an **'alternative' EMPLOYER** focused version of the WT form
 - This compliments the current guidance and documentation from an employer perspective.



Witness testimony dispensation Guidance





City & Guilds
A City & Guilds Group Business

Level 3 Customer Service Specialist
Assessment 703/753: Practical observation
Employer Witness Testimony to confirm competency

This document includes information and guidance on completing the Witness Testimony to confirm the apprentice's competency against the standard covered by the observation.

Section 1

Apprentice Name		Enrolment number	
Witness Name		Date	
Organisation Name			
Witness Job Title / Position			
Relationship to apprentice	Please provide details of your relationship to the apprentice (eg: how long have you worked with the apprentice and in what capacity).		

DRAFT

Employer guidance

- By completing this document* you are confirming that the apprentice is competent against the standard.
- You must provide a minimum of TWO examples of situations showing how the apprentice has met the criteria below.
- You might find that any of the examples given could be used as evidence to cover multiple criteria across the practical observation standard.

This Witness Testimony can be completed by:*

- The Witness completing this document.
- An audio recording with the witness recording the details or a professional discussion between the Witness and the Provider.
- The employer and the apprentice working together, discussing examples either recorded in the written witness testimony or in an audio recording.

Guidance on completion

- Overall, the examples must show instances of where the apprentice confidently dealt with at least 3 different customer types and their emotions, in order to achieve a successful outcome for them.
- The examples should also cover the topics listed below and, as each topic is covered, the relevant box should be ticked.
- Should you use the audio recording route you should, where possible, note the time stamp of where in the recording the topic can be found.
- Once all topics have been covered and recorded, either in writing or audio recorded, as the employer you, along with the apprentice, must sign and date this form.
- Customers can be internal and/or external.



Witness testimony dispensation Guidance



DRAFT

Section 2

All criteria listed here must be met.
As the employer, please tick each area as completed and please describe in the example boxes below each section detail situations on how the apprentice was able to meet the criteria.

Within the examples you describe below of work the apprentice carried out, please ensure that the following detail is also included.	Tick
Demonstrate achievement of results through effective teamwork and collaboration with colleagues at all levels. (OB16)	
Show adaptability of own skills when working with internal customers. (OB17)	
Demonstrate adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery. (OB18/19)	
Demonstrate when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations. (OB13)	
Show how their personal presentation made a positive impact on their organisation's brand (OB21)	
Show proactivity and creativity when identifying solutions to customer and organisational issues. (OB15)	

Criteria	What needs to have been witnessed and described.	Tick when all covered
In two situations the apprentice must have assessed situations and offered clear explanations, options and solutions that balance customer and organisational requirements. (OB6/9)	<ul style="list-style-type: none"> How did they assess customer service situations they were faced with? 	

Demonstrate through advanced questioning, <u>listening</u> and summarising, the negotiation of mutually beneficial outcomes (OB7)	<ul style="list-style-type: none"> How did they offer explanations, options and a <u>solutions</u> that balances the requirements of both the customer and the organisation? 	
Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive <u>outcomes</u> . (OB11)	<ul style="list-style-type: none"> How did they show they questioned, <u>listened</u> and summarised negotiated mutually beneficial outcomes? How did they adapt their communication style when handling complex information to customers? 	

Example 1 – Apprentices should be encouraged to contribute <u>in</u> identifying the best examples from their work. This may include apprentice writing some of the content in this example. It is important that the content is finalised and validated by the witness. Remember that the example should aim to cover as many <u>items</u> in the tables listed above.	Time stamp for audio



Witness testimony dispensation Guidance



DRAFT

Example 2 – Apprentices should be encouraged to contribute in identifying the best examples from their work. This may include apprentice writing some of the content in this example. It is important that the content is finalised and validated by the witness. Remember that the example should aim to cover as many items in the tables listed above.

Time stamp for audio

Criteria	What needs to have been witnessed and described.	Tick when all covered
<p>In two situations the apprentice must have demonstrated the resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout. (OB5)</p> <p>How did they demonstrate management of challenging and complicated situations, balancing organisational needs and customer satisfaction? (OB8)</p> <p>How did they identify, <u>negotiate</u> and agree appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedure? (OB14)</p>	<ul style="list-style-type: none"> • What complex issue was resolved? • What was the apprentice’s involvement in resolving it? • How was accountability demonstrated? • What was the approach to resolve the issue and why? • How did they manage the situation, identifying, <u>negotiating</u> and agreeing appropriate options? • How did they balance the organisational needs with the customer’s need and reach customer satisfaction? • How did they make realistic commitments to the customer delivering them in line with the organisation’s policy and procedures? 	

Example 3 – Apprentices should be encouraged to contribute in identifying the best examples from their work. This may include apprentice writing some of the content in this example. It is important that the content is finalised and validated by the witness. Remember that the example should aim to cover as many items in the tables listed above.

Time stamp for audio



LIEPA Feedback

Witness testimony dispensation (with Q&As)



Witness requirements:

- Please note, this method of assessment is a **direct replacement** for the observation.
- State their, name, job title, position, relationship to the apprentice (**often missing**).
- The witness must work in a role equivalent to first line management of the apprentice, or above, eg: Team Leader. Using the term 'colleague' is insufficient. You need to state how the person had responsibility for the apprentice.
- The witness must have worked with the apprentice for a minimum of 3 months during the course of their apprenticeship (**dates often missing**).



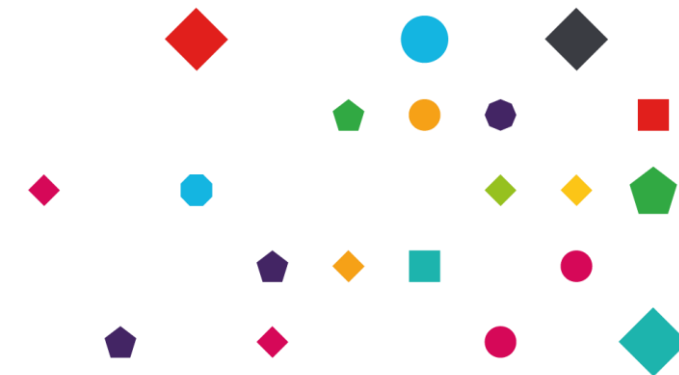
LIEPA Feedback

Witness testimony dispensation (with Q&As)



Witness requirements:

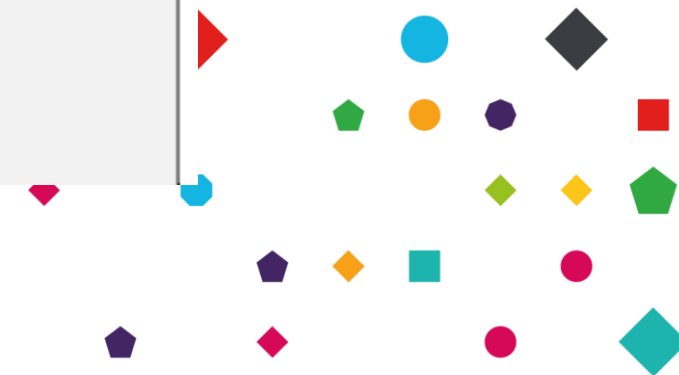
- Evidence must be generated on programme.
- Must include approximate dates (month and year).
- Clear examples of direct observation where the apprentice has demonstrated competency against the standard whilst on programme.



Level 3 Customer Service Specialist

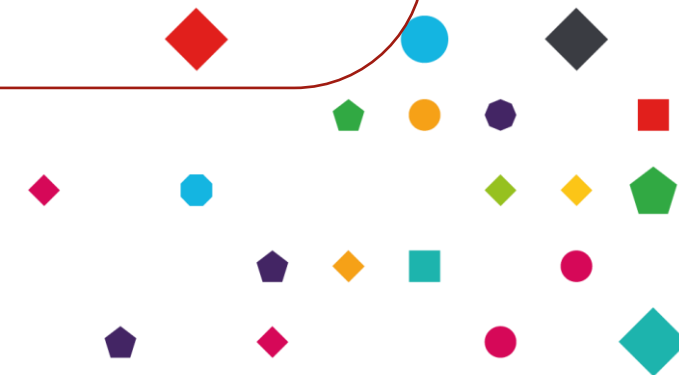
Assessment 703/753 Practical observation (with Q&As) grade descriptors table

Standard module	City & Guilds Ref	Assessment requirement	Pass descriptors	Distinction descriptors
Knowing your customers and their needs/customer insight	OB1	How to analyse, use and present a range of information to provide customer insight	Demonstrates how they analyse, use and present a range of information in order to provide customer insight	N/A
	OB2	Understand different customer types and the role of emotions in bringing about a successful outcome	An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.	
			Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.	
OB3	Understand how customer expectations can differ between cultures, ages and social profiles	Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.		
Customer service culture and environment awareness	OB4	Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers	Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.	N/A



Key Criteria – Practical Observation & WT Q&A

- **OB1** - How to analyse, use and present a range of information to provide customer insight.
- **OB3** - Understand how customer expectations can differ between cultures, ages and social profiles.
- **OB4** - Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers.
- **OB10** - Identify where highs and lows of the customer journey produce a range of emotions in the customer.

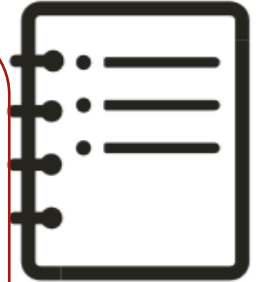


Work based project with interview

Work based project supported by interview - Timeline

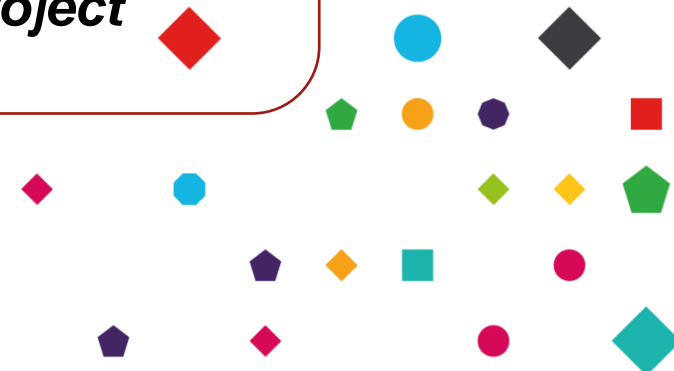
Throughout the apprenticeship

- *Discuss / review possible areas of customer service provision that could be the basis for the project.*
- *Common areas of customer service failure*



Gateway

- *Project proposal required (500 words).*
- *Submitted on the up to date project proposal form.*
- ***Proposal is approved and signed.***
- ***NB: The time frame of 2 months does not start until the project proposal is accepted***

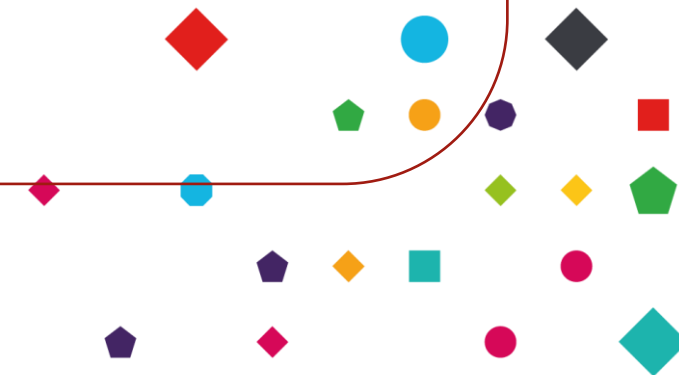


Choosing the project topic



It is important that centres support apprentices to consider the following questions.

- Is the project appropriate?
- impact of the project on internal and external customers?
- Research is key
- Is the project realistic?
- Consider areas of service failure



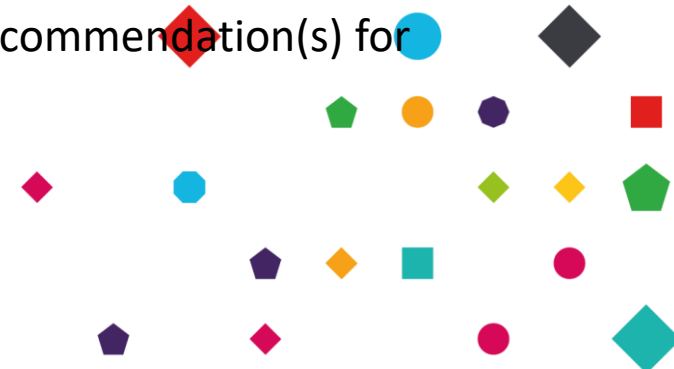
Guidance on the WBP proposal



- It's a brief outline of the project and be **no more than 500 words**
- **Use the template provided (recording forms pack)**

The work-based proposal must state **ALL** of the following:


- the area within the apprentice job role / business that they have identified as requiring possible improvement to their customer service provision
- a clear project title
- how the apprentice will gather information on their organisation's customer types, needs and expectations
- how the apprentice will communicate with customers to gain information on their journey and challenges of their end to end experience
- how the apprentice intends to gather data and obtain customer feedback (qualitative and quantitative using a variety of methods)
- How the apprentice intends to analyse, use and present the data gathered to inform recommendation(s) for continuous improvement to customer service.



Guidance on the WBP proposal



Figure 1 – previous project proposal doc



Level 3 Customer Service Specialist

Assessment 702/752: Work based project proposal

Apprenticeship standard	Level 3 Customer Service Specialist		
Apprentice Name		Enrolment number	

Title and proposed content

Note: Please ensure that this is a maximum of 500 words

Figure 2 – new project proposal doc.

Project Title and outline

Note: Provide a title with a brief outline (no more than 500 words) of the intended Work-based Project.

You MUST indicate within the proposal how you intend to cover ALL of the following:

- The area of the business that requires a recommendation for change to improve customer service.
- How you will gather and analyse information on your organisation's customer types and their needs and expectations.
- How you will communicate with customers to gain information on their journey and the challenges of their end-to-end experience.
- How you intend to gather data and obtain customer feedback (qualitative and quantitative using a variety of methods).
- How you intend to analyse, use and present the data gathered to inform recommendation(s) for continuous improvement to customer service.

Project Title

Project Outline



Guidance on the WBP proposal

Approval and feedback



IEPA feedback on suitability of proposed project (IEPA comments only)

APPROVED - This Project Proposal is approved subject to the Apprentice meeting the requirements of this assessment method. The Independent End-point Assessor's feedback given against each of the criterion listed above must be discussed with the Apprentice and actioned.

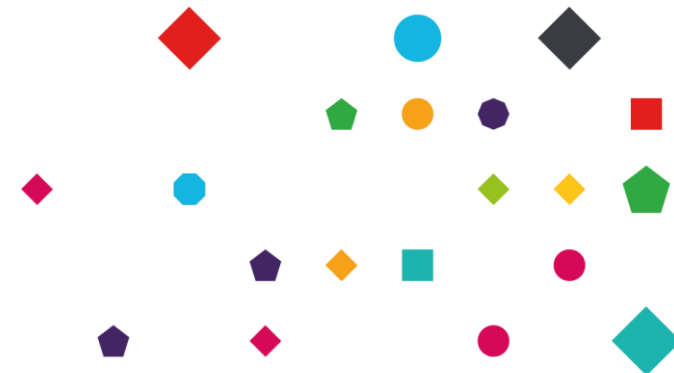
All activity including research required to evidence the criteria for the Work-based Project can now commence.

REJECTED - This Project Proposal is rejected on the basis that insufficient information was provided to show that the requirements of this assessment method could be met. The Independent End-point Assessor's feedback given against each of the criterion listed above must be discussed with the Apprentice and actioned before resubmission of a revised Proposal. A revised Proposal is required to either:

add additional detail to the current Proposal to identify how the criteria will be met

or

submit a Proposal based on a new Project to cover all criteria as listed above.



WBP evidence reference form proposal

- Work-based project evidence reference form added



Level 3 Customer Service Specialist



Assessment 702/752: Work based project - Evidence Reference Form

This form must be submitted together with the work-based project report.

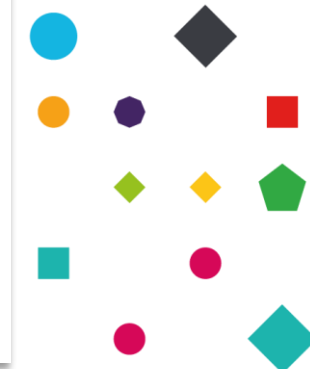
The purpose of this document is to map the evidence provided within the work-based project report, including annexes, to the relevant Pass/Distinction grading descriptor.

Please indicate the page number/annex reference against each grading descriptor (Pass/Distinction).

Business knowledge and understanding

- **WB1** - Understand your organisation's current business strategy in relation to customers and make recommendations for its future.
- **WB2** - Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation.
- **WB3** - Understand the principles and benefits of being able to think about the future when taking action or making service related decisions.

City & Guilds Standard reference	Pass descriptors	Project Page/ Annex Reference	Distinction descriptors	Project Page/ Annex Reference
WB1	P1: 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.		D1: 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.	
WB2 & WB3	P1: Ability to recommend improvement to the customer service provision, the steps required to implement this change and the benefit this change		D1: Ability to consider the possible impact on their organisation of not considering the future in decision-making.	



Work based project proposal exemplars



Compile proposal using grade descriptor table to support planning and check for coverage.

Apprentice Name	Apprentice 1	Enrolment number	ABC1234
Improving the customer service experience for customers accessing pet treatment services at the Hill View Veterinary Practice			
<i>Note: Please ensure that this is a maximum of 500 words</i>			
<u>Improving the customer service experience for customers accessing pet treatment services at the Hill View Veterinary Practice</u>			
<p>The objective of the project is to identify if improvements can be made to the quality and speed of customer service given to different customer groups based on a customer complaint received due to the miscommunication of a diagnosis of a customer's pet and the subsequent bill that was charged. (WB2,WB13)</p> <p>I will develop a questionnaire which customers will complete in writing or electronically (using an iPad in our reception area). Customers will be asked to rate and comment on their customer service experience with focus on communication of diagnosis, cost of treatment and suggest recommendations for improvement. I will create a spreadsheet to enter the results of the questionnaires. (WB3,WB4,WB8,WB12)</p> <p>I will also interview staff to gather their opinions on potential customer service improvements. I will create posters to inform customers a survey is being delivered to customers visiting out veterinary surgery. (WB3, WB4,WB6,WB7,WB12)</p> <p>A detailed analysis of the following data will take place to support and inform my recommendations going forward:</p> <ul style="list-style-type: none"> - The customer's complaint including: <ul style="list-style-type: none"> o the customer's journey (WB4,WB9) o factors involved in the cause service failure (I.T errors, staffing) (WB5,WB9,) o the role each department played (WB7,WB12) - Current process and procedure for dealing with complaints (WB1,WB5) 			

Level 3 Customer Service Specialist

Assessment 702/752 Work based project interview grade descriptors table

Standard module	City & Guilds Ref	Assessment requirement	Pass descriptors	Distinction descriptors
Business knowledge and understanding	WB1	Understand your organisation's current business strategy in relation to customers and make recommendation for its future.	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.	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.
	WB2	Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation	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 how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.	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.
	WB3	Understand the principles and benefits of being able to think about the future when taking action or making service related decisions	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.	Ability to consider the possible impact on their organisation of not considering the future in decision-making.



Work based project supported by interview - Timeline

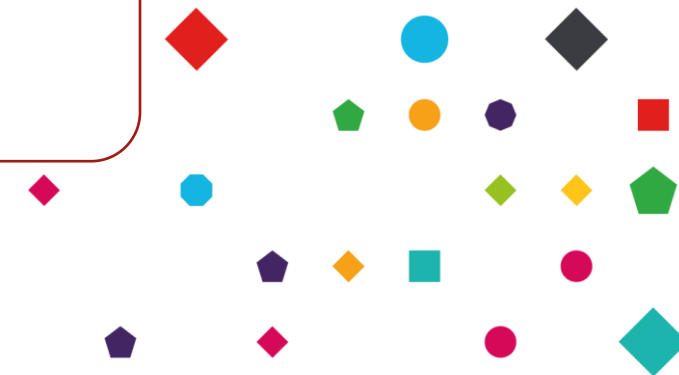
IEPA approves project proposal

Carry out the project

- *8 weeks maximum to complete the project and compile report.*

Submit project report

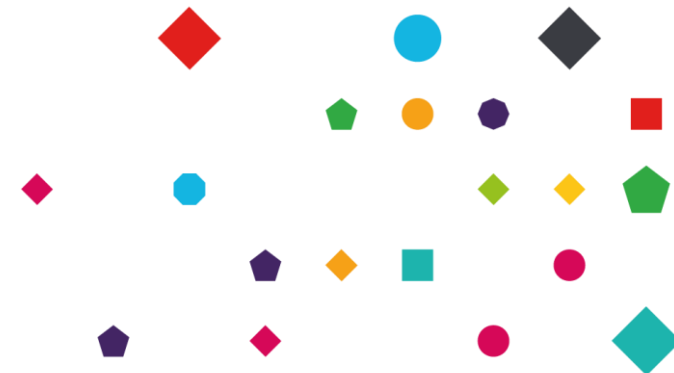
- *Submit 2 weeks prior to EPA*
- *Final report on project to be 2500 words (10% tolerance)*



In Summary - Updates to the Guidance

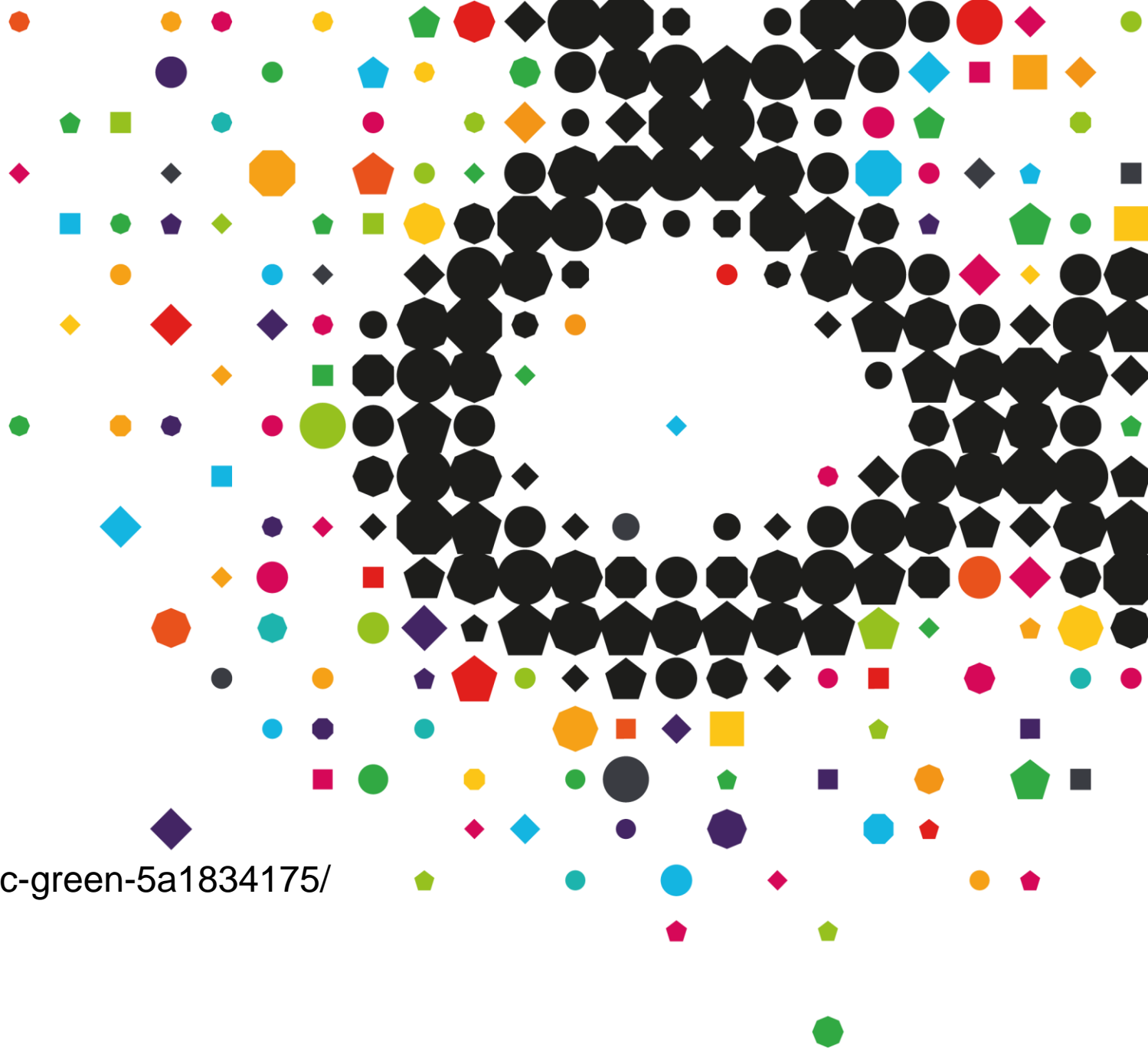


- Added a Work-based project evidence reference form
- Simplified the work-based project proposal form – Friday 8th April
- Further exemplar project proposals to be released
- LIEPA reports available on EPA Pro showing best practice
- Employer guidance on WT to be introduced
- WT Dispensation ends 30th June 2022
- Further information will be given when the new documentation is released.



Questions answers

Thank you



Twitter: @candgbusiness 

LinkedIn: <https://www.linkedin.com/in/dominic-green-5a1834175/>