

Customer Service Observation webinar November 2022

The questions below were gathered from the live CS webinar held on 1st November 2022

I have three L3 CS learners in the same workplace who started at the same time, who will all need to do a project in a short space of time. Do you have any suggestions as it's a small company so three projects will be very difficult to find and plan???

We would recommend speaking to their line managers regarding any naturally occurring projects which impact customer service. Please remember that project evidence cannot be gathered prior to the proposal being accepted.

If my learner starts her shift at 7 am and the busiest time is between 7.30 to 8.30 will the IEPA arrive at an early time of the morning? The learner works in a cafe which is in a train station and relies on commuters.

Although this is not normal practice to conduct EPAs at this time please do speak to our EPA team when booking the learner's EPA to discuss possibilities.

How can we access the apprenticeship training manual?

We recommend speaking to your regional business manager or our direct sales team for further information. This is a purchasable resource which supports on programme learning

I have a learner in a Bridal shop. She only sees one customer in 90 minutes. She is doing Level 2 but will struggle to interact with different customer types. Any suggestions?

Customers can be internal as well as external and so the IEPA can see interaction with both.

A learner has gone through Gateway but a remote observation would suit them better, how do I arrange this?

Please contact our EPA Team to discuss this further. You will then need to complete a customer observation remote observation checklist form. This can be found on EPA Pro

Remote Observation - is the software compatible with a Mac and PC?

Yes, our remote observation offer is available on both platforms

Do both sides of any phone calls need to be heard?

Yes, for the IEPA to assess properly, both sides of any calls need to be heard. The learner may use the loudspeaker function or (dual headsets if face to face) for this.

What about calls of a sensitive nature such as social care, the vulnerable customers are unlikely to give consent and very sensitive information will be shared which may concern line managers?

We would strongly recommend speaking to the learner's line manager regarding this as consent will be required.

Can we have a definitive description of customer types please?

We defined '3 customer types' as customers who all have **varying needs** to help broaden the scope of customers that could be captured within this definition. Examples could be those customers with ESOL, internal, external, complaints, sales, stock queries etc.

How can you observe CSS apprentices who deliver service in customers' homes?

Unfortunately, IEPAs cannot enter customers' homes to observe EPAs

My organisation has taken on an apprentice who is part of the inclusive project. He has communication issues as he has autism. What exemptions would there be. His department have taken him on and not considered the EPA process and we do not have a choice.

You can apply for special considerations to support your learner during EPA

Is there a cut off date for the witness testimony to be used?

If ATE have already stopped the use of the WT as a dispensation (July 2022)

If a learner is remote working, and dealing with phone calls, how will the IEPA 'hear' the customer?

My learner often uses headset only.

It will be the responsibility of the learner to ensure the IEPA can hear both sides of the call. We would suggest using the loudspeaker function.

My question relates to the witness statement dispensation. It is such a good document that i am using it for the portfolio as a simple witness testimony evidence. Is this ok?

Witness testimonies are a good source of evidence to use within the portfolio.