



# Customer Service Specialist Apprenticeship Standard – Level 3



The main purpose of a customer service specialist is to be a 'professional' for direct customer support within all sectors and organisation types. You are an advocate of Customer Service who acts as a referral point for dealing with more complex or technical customer requests, complaints, and queries. You are often an escalation point for complicated or ongoing customer problems.

Utilising both organisational and generic IT systems to carry out your role with an awareness of other digital technologies. This could be in many types of environment including contact centres, retail, webchat, service industry or any customer service point

## How will Apprentices learn?

Our Personal Training Advisors will deliver high-quality face-to-face teaching and learning at the employer's premises. They will provide all the resources your Apprentices will need to progress.

Our intuitive learner management system, OneFile will really bring the subject to life through our online resources. We provide real-time learner information so that you will always know what is being taught and how learners are progressing.

## What will Apprentices learn?

This Apprenticeship has been designed to develop existing and new skills and to equip Apprentices with the knowledge required to offer continuous improvements in customer service and communication skills, empowering them to be confident to deal with your customers in a positive, personable and professional way.

Our Apprenticeships provide highly effective teaching and learning tailored to meet individual business needs and to provide job-specific skills vital for peak business performance.

The apprentice will learn knowledge, skills and behaviours within this qualification such as;

- **Business Knowledge and Understanding**
- **Customer Service Performance**
- **Ownership/Responsibility**
- **Service Improvement**
- **Team working**

## Duration

The minimum timeframe for this qualification is 12 months. End Point Assessment will follow teaching and learning period and is estimated to take 3 months.

## Maths and English functional skills

Apprentices will be required to have or achieve level one English and Maths and to have taken level two English and Maths tests prior to completion of their Apprenticeship.

## Off the job (OJT)

The apprentice must receive off-the-job training for a minimum of 20% of the time that they are paid to work.

There are many activities that can be calculated towards the OJT hours such as;

- Shadowing a colleague
- Online learning
- Internal training
- Team Meetings
- Appraisal/1-2-1 visits

The full criteria can be found by visiting;

[institute-for-apprenticeships.org/apprenticeship-standards/customer-service-specialist/](https://institute-for-apprenticeships.org/apprenticeship-standards/customer-service-specialist/)



# Customer Service Specialist

## Knowledge, Skills and Behaviours – Level 3



Knowledge What is required (in-depth knowledge of organisation and wider business environment)	
<b>Business Knowledge and Understanding</b>	<ul style="list-style-type: none"> <li>Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation</li> <li>Understand the impact your service provision has on the wider organisation and the value it adds</li> <li>Understand your organisation's current business strategy in relation to customers and make recommendations for its future</li> <li>Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions</li> <li>Understand a range of leadership styles and apply them successfully in a customer service environment</li> </ul>
<b>Customer Journey knowledge</b>	<ul style="list-style-type: none"> <li>Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience</li> <li>Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention</li> <li>Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation</li> <li>Understand commercial factors and authority limits for delivering the required customer experience</li> </ul>
<b>Knowing your customers and their needs/ Customer Insight</b>	<ul style="list-style-type: none"> <li>Know your internal and external customers and how their behaviour may require different approaches from you</li> <li>Understand how to analyse, use and present a range of information to provide customer insight</li> <li>Understand what drives loyalty, retention and satisfaction and how they impact on your organisation</li> <li>Understand different customer types and the role of emotions in bringing about a successful outcome</li> <li>Understand how customer expectations can differ between cultures, ages and social profiles</li> </ul>
<b>Customer service culture and environment awareness</b>	<ul style="list-style-type: none"> <li>Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers</li> <li>Understand your business environment and culture and the position of customer service within it</li> <li>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</li> <li>Understand how to find and use industry best practice to enhance own knowledge</li> </ul>



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## Knowledge, Skills and Behaviours – Level 3



Skills What is required (advancing key skills to support progression to management)	
Business focused service delivery	<ul style="list-style-type: none"> <li>▪ Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice</li> <li>▪ Resolve complex issues by being able to choose from and successfully apply a wide range of approaches</li> <li>▪ Find solutions that meet your organisations needs as well as the customer requirements</li> </ul>
Providing a positive customer experience	<ul style="list-style-type: none"> <li>▪ Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes</li> <li>▪ Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy</li> <li>▪ Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps</li> <li>▪ Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction</li> <li>▪ Demonstrate a cost conscious mind-set when meeting customer and the business needs</li> <li>▪ Identifying where highs and lows of the customer journey produce a range of emotions in the customer</li> <li>▪ Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format</li> </ul>
Working with your customers/customer insights	<ul style="list-style-type: none"> <li>▪ Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it</li> <li>▪ Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service</li> </ul>
Customer service performance	<ul style="list-style-type: none"> <li>▪ Maintain a positive relationship even when you are unable to deliver the customer's expected outcome</li> <li>▪ When managing referrals or escalations take into account historical interactions and challenges to determine next steps</li> </ul>
Service improvement	<ul style="list-style-type: none"> <li>▪ Analyse the end to end service experience, seeking input from others where required, supporting development of solutions</li> <li>▪ Make recommendations based on your findings to enable improvement</li> <li>▪ Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice</li> </ul>
Behaviours/Attitude What is required (Role-model behaviours and positive contribution to culture)	
Develop self	<ul style="list-style-type: none"> <li>▪ Proactively keep your service, industry and best practice knowledge and skills up-to-date</li> <li>▪ Consider personal goals related to service and take action towards achieving them</li> </ul>
Ownership/ Responsibility	<ul style="list-style-type: none"> <li>▪ Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation</li> <li>▪ Exercises proactivity and creativity when identifying solutions to customer and organisational issues</li> <li>▪ Make realistic promises and deliver on them</li> </ul>
Team working	<ul style="list-style-type: none"> <li>▪ Work effectively and collaboratively with colleagues at all levels to achieve results.</li> <li>▪ Recognise colleagues as internal customers</li> <li>▪ Share knowledge and experience with others to support colleague development</li> </ul>
Equality	<ul style="list-style-type: none"> <li>▪ Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer</li> <li>▪ Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment</li> </ul>
Presentation	<ul style="list-style-type: none"> <li>▪ Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction</li> <li>▪ Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand</li> </ul>



## Customer Service Specialist End Point Assessment – Level 3



The end point assessment will only commence once the Employer, Apprentice and Smart Training Advisor are confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard and that these are clearly evidenced through the progress review meetings and records. The independent end point assessment ensures that all Apprentices consistently achieve the industry set professional standard. The EPA can commence at any point once the apprentice is competent and after the twelve-month minimum period of learning and development. Prior to independent end point assessment the functional skills English and maths components of the apprenticeship must be successfully completed.

### What does the EPA comprise for this Apprenticeship?

Practical Observation with Q&A	Work-based Project	Professional Discussion
The practical observation is a 60 minute (+/- 10%) work-placed observation in which the apprentice must be observed by an independent assessor	Customer Service Specialist apprentices must submit a 2500 word written report (+/- 10%), on a project they have carried out, at least 2 weeks prior to an interview date.	The professional discussion will last 60 minutes (+/- 10%) and will include evidence from the on-programme portfolio of evidence which must be submitted at least 2 weeks prior to the professional discussion

The Independent end assessor confirms that each assessment element has been completed.

The apprenticeship includes Pass and Distinction grades with the final grade based on the apprentice’s combined performance in each assessment activity.

In order to pass the apprentice is required to pass each of the assessments. Should an apprentice fail one assessment activity this should be retaken as soon as the apprentice is ready and when practicable for the business.

Should they fail two or more activities a period of further training and development lasting between one and three months must take place before a resit. For more information on grading criteria please refer to the apprenticeship standard assessment plan by searching via <https://findapprenticeshiptraining.sfa.bis.gov.uk/>