



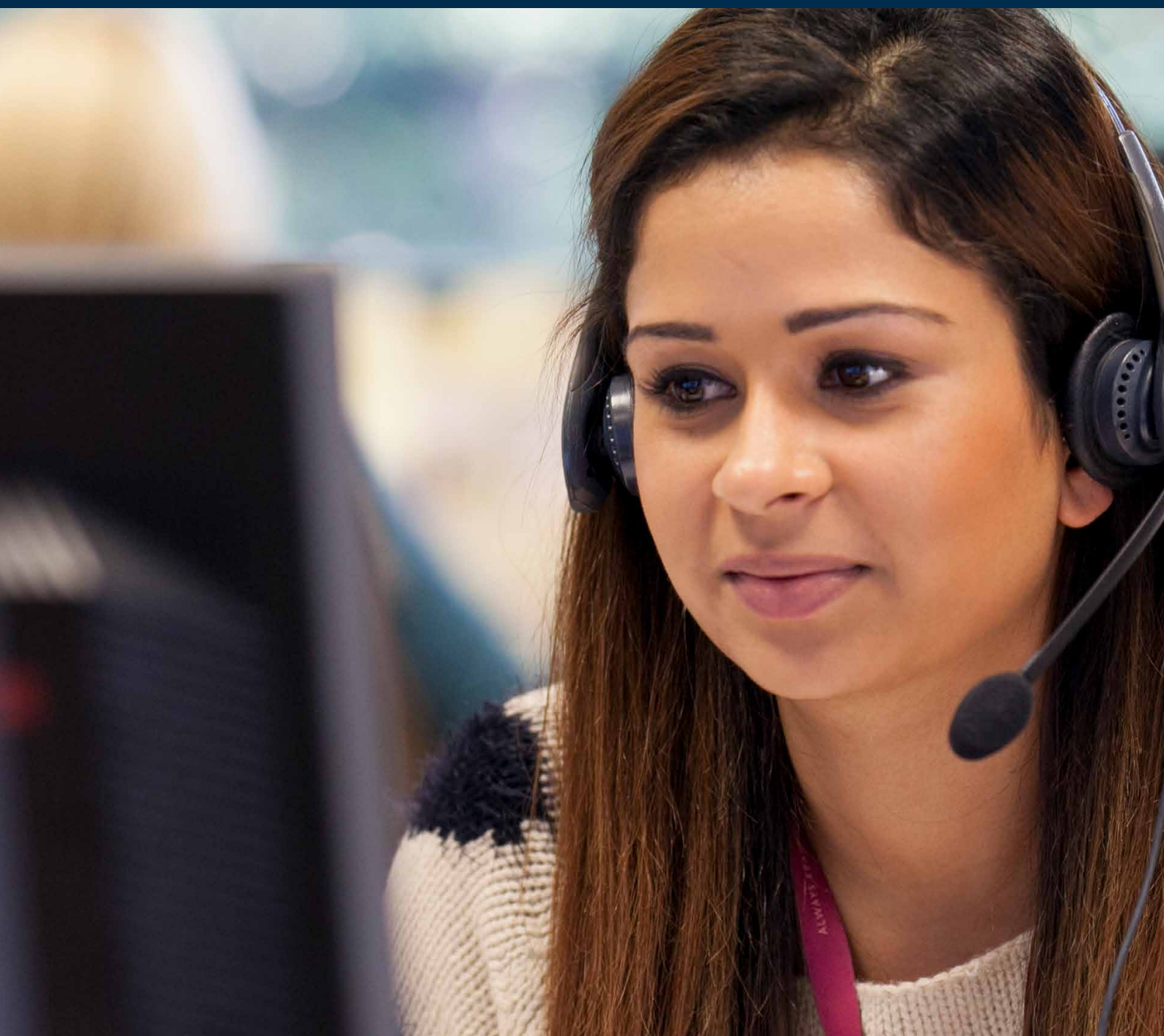
Pearson

# Pearson Level 2 End-point Assessment for Customer Service Practitioner

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Issue 5



## **Pearson and Apprenticeships**

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This specification is Issue 5. Key changes are summarised on the next page. We will inform centres of any changes to this issue. The latest issue can be found on our website.

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## Summary of changes to Pearson Level 2 End-point Assessment for Customer Service Practitioner specification

### Issue 5 changes

Summary of changes made between previous Issue 4 and this current Issue 5	Page number
Content for Components 1, 2 and 3 is no longer in this specification and can be found in the <i>Pearson Level 2 End-point Assessment for Customer Service Practitioner - Additional Resources</i> document	
Evidence requirements for Components 1, 2 and 3 are no longer in this specification and can be found in the <i>Pearson Level 2 End-point Assessment for Customer Service Practitioner - Additional Resources</i> document	
<i>Annexe A: Apprentice Showcase Brief</i> is no longer in this specification and can be found in the <i>Pearson Level 2 End-point Assessment for Customer Service Practitioner - Additional Resources</i> document	
<i>Annexe B: Identifying potential work-based evidence for the Observation Assessment</i> is no longer in this specification and can be found in the <i>Pearson Level 2 End-point Assessment for Customer Service Practitioner - Additional Resources</i> document	
<i>Annexe C: Mapping of Practical Observation grade criteria to the Performance requirements</i> is now known as <b>Annexe A</b>	41
<i>Annexe D: Gateway Declaration Form</i> is now known as <b>Annexe B</b>	45
<i>Annexe E: Apprentice Showcase Authentication and Certification Declaration form</i> is now known as <b>Annexe C</b>	46

If you need further information on these changes or what they mean, contact us via our website at: [qualifications.pearson.com/en/support/contact-us.html](https://qualifications.pearson.com/en/support/contact-us.html).



## Collaborative development

Pearson has worked in close collaboration with employers, sector experts, other assessment organisations and further education providers who will be involved in the delivery of this end-point assessment. We are grateful to all those who have generously shared their time and expertise to help us in the development process.



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# End-Point Assessments for the New Apprenticeship Standards

## Introduction

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In October 2013, the government began the implementation of the plan to reform apprenticeships in England. The reform includes changes that move the design of apprenticeships into the hands of employers, with the aim of making them more rigorous and responsive to employers' needs. Employer groups, referred to as Trailblazers, now lead on the development of apprenticeships for occupations where they identify the need for apprentices.

One of the most significant changes in this reform is the introduction of an independent end-point assessment. The end-point assessment (EPA) is a synoptic assessment of the knowledge, skills and behaviours outlined in the apprenticeship standard, and learned throughout the apprenticeship programme. The end-point assessment can only be delivered by a registered assessment organisation that must be independent of the employer or any apprenticeship training provider involved in the delivery of the on-programme phase of the apprenticeship. All assessment decisions for the end-point assessment must be made by the independent assessment organisation.

All apprentices must undertake the independent end-point assessment at the end of the on-programme phase of training when their employer, and in some cases their training provider, is satisfied that they have met the 'gateway' criteria to undertake the assessment. The purpose of the end-point assessment is to make sure the apprentice meets the standard set by employers and is fully competent in the occupation. An apprentice cannot be awarded the apprenticeship certificate until they have successfully completed the end-point assessment.

Pearson, as a registered assessment organisation, has been working closely with employers, further education providers and occupational experts in the development of end-point assessment tools to ensure that they are:

- valid and appropriate to assess occupational competence in the relevant industry and will deliver reliable outcomes
- fair to all apprentices and help them to make progress in their lives
- manageable for apprentices and the industry and can be delivered effectively and efficiently.

This specification and the accompanying *Pearson Level 2 End-point Assessment for Customer Service Practitioner – Additional Resources* document contain the information needed to prepare apprentices for the Level 2 End-point Assessment for Customer Service Practitioner QN 603/2271/8. The additional resources document is available directly from Pearson once an EPA service agreement is in place.

# 1 The Customer Service Practitioner Apprenticeship

## Overview

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The end-point assessment in this specification relates to the Customer Service Practitioner Apprenticeship. The apprenticeship is at Level 2 and is for apprentices working in the role of a customer service practitioner.

The overall aim of the end-point assessment is to ensure that the apprentice has met the required level of knowledge, skills and behavioural standards set by employers and is competent in their role as a Customer Service Practitioner.

The role of a customer service practitioner is to deliver high quality products and services to the customers of their organisation, which may be delivered from their workplace directly, digitally, or by going to the customer's own premises. Their contact with customers may be one-off or routine, and will include dealing with orders, payments, offering advice, guidance and support, meet-and-greet, sales, fixing problems, after care, service recovery or gaining insight through measuring customer satisfaction. Their customer interactions may cover a wide range of situations and can include; face-to-face, telephone, post, email, text and social media.

Customer service practitioners work in different types of industries and organisations and are expected to demonstrate excellent customer service skills and behaviours as well as product and/or service knowledge when delivering to their customers. They must provide service in line with the organisation's customer service standards and strategy and within appropriate regulatory requirements. They may be the first point of contact and so their actions influence the customer experience and satisfaction with an organisation.

Completion of this apprenticeship will lead to eligibility to join the Institute of Customer Service as an Individual member at Professional level.

The typical duration for this apprenticeship is at least 12 months.

To achieve the apprenticeship certificate, apprentices are required to successfully complete their on-programme period of learning and development and the end-point assessment detailed in *Section 3* in this specification.

The overall apprenticeship is graded as Pass/Distinction.

The certificate for the apprenticeship is awarded by the Institute for Apprenticeships, through a process administered by the Education and Skills Funding Agency (ESfA). As the apprenticeship assessment organisation, Pearson will claim for the certificate, on behalf of the apprentices.

Centres should familiarise themselves with the requirements of the apprenticeship and communicate these clearly to apprentices.

The published Customer Service Practitioner Standard and Assessment Plan can be found at [www.gov.uk/government/collections/apprenticeship-standards](http://www.gov.uk/government/collections/apprenticeship-standards).

## 2 Customer Service Practitioner End-point Assessment

### Structure

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The end-point assessment (EPA) for the Customer Service Practitioner apprenticeship consists of the following three assessment components:

End-point assessment components	Duration
Apprentice Showcase	Approximately 10 hours (by the apprentice, prior to submission to the IEA)
Practical Observation	Minimum 1 hour
Professional Discussion	Maximum 1 hour

Apprentices are expected to complete all components of the end-point assessment within a month from the start of the end-point assessment period and assessment components are expected to be completed in the order that they are shown in the specification.

Detailed information about each of these end-point assessment components is given in *Section 3*.

## Grading

The grade for the end-point assessment is based on the apprentice's aggregated achievement of the specified grade criteria across all three components. Grades are not reported for individual assessment components.

The table below shows how the grade for the end-point assessment is determined.

End-point assessment grade	Grade requirements
Pass	The apprentice must achieve <i>all Pass grade criteria</i> across all three end-point assessment components.
Distinction	<i>In addition to the Pass grade requirement</i> , the apprentice must achieve: <ul style="list-style-type: none"><li>• 7 of the 10 (70%) of the Distinction grade criteria within the Apprentice Showcase assessment</li><li>• 4 of the 5 (80%) of the Distinction criteria within the Practical Observation assessment</li><li>• 3 of the 4 (75%) of the Distinction criteria within the Professional Discussion assessment.</li></ul>

The grade criteria for each end-point assessment component are given in *Section 3*.

## Entry requirements

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Apprentices should only be recommended for their end-point assessments, by their employer, when the employer is confident that the apprentice is ready.

Before progressing to the end-point assessment, all apprentices must be signed-off by their employer and/or training provider, through the 'gateway'. This gateway sign off confirms that apprentices have the level of occupational knowledge, skills and behaviours required to achieve the apprenticeship and is therefore 'ready for end-point assessment'. The stated mathematics and English requirements form part of the gateway and so must be achieved before apprentices attempt the EPA. In this case, apprentices are expected to have achieved at least level one English and Maths, before attempting their end-point assessment, and have taken level two English and Maths, before completing their end-point assessment.

Centres must complete an End-point Assessment Gateway Declaration form, with the employer and apprentice, which can be found in *Annexe B*. This form and the associated gateway evidence will be transferred to Pearson, before the end-point assessments take place. The form captures the mandatory pre-requisites for the end-point assessments and any other organisation-specific evidence. The assessments cannot take place, unless the relevant information and evidence is available.

## Language of assessment

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The end-point assessment is conducted in English.

Apprentices may be assessed in British or Irish Sign Language where it is permitted for the purpose of reasonable adjustment.

## Availability of the end-point assessment

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The end-point assessment will be available from September 2017.

## Preparing apprentices for the end-point assessment

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It is recommended that apprentices follow a structured programme of training and development based on the apprenticeship standard to ensure that they develop the knowledge, skills and behaviours underpinning occupational competence. The period of training and development on-programme should be a minimum of 12 months and must include a minimum of 20% off-the-job training, away from the day-to-day job.

In order to prepare apprentices effectively, it is important that employers and training providers have a good understanding of the apprenticeship standard and the structure and format of the end-point assessment. The information about the end-point assessment and the individual components provided in this specification will support employers and training providers in planning the learning and development programme and designing formative assessment to prepare apprentices for the end-point assessment. Regular reviews of progress and readiness should be built into the training and development programme to ensure that apprentices are ready for their end-point assessment. The end-point assessment gateway must take place after a minimum of 12 months on-programme.

## End-point assessment planning and scheduling

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It is expected that all components of the end-point assessment are completed within one month from the start of the end-point assessment period. The end-point assessment components must be completed in the order specified in *Section 3*.

Once the employer is satisfied that apprentices have met the apprenticeship standard and are ready for end-point assessment, an end-point assessment planning meeting will be held with the Pearson independent end-point assessor.

The purpose of the meeting is to share information with the independent end-point assessor to support the assessment process and to agree a plan for the upcoming assessment activities for apprentices. Pearson will liaise with the employer before the meeting to agree the information required. The independent end-point assessor will agree a plan and schedule for each assessment activity to ensure that all assessment components can be completed within the end-point assessment time.

The end-point assessment-planning meeting may be conducted remotely using appropriate technology.

Centres must be approved before they can offer this end-point assessment and apprentices must be registered and booked onto their end-point assessment in sufficient time to allow adequate planning and scheduling of the assessments.

## Reassessment

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An employer should only enter an apprentice for end-point assessment if they are confident that, in operating their 'gateway' process, the apprentice has accrued sufficient knowledge, skills and behaviours whilst on programme to demonstrate mandated occupational competence in the assessment.

If an apprentice fails to meet all the pass criteria within a component on first assessment attempt, they will be permitted two (2) further reassessment attempts for that component. These will take the form of resubmission for the Showcase and retest of the Observation and Professional discussion. Should the apprentices fail any part of the end-point assessment, further development and support must be provided, prior to a resubmission or retest.

If an apprentice meets all pass criteria during their first reassessment of a component, their achievement of Distinction criteria within that component in the reassessment will carry forward to aggregate towards the overall EPA grade (in the same way as it would for their first attempt). However, any Distinction criteria evidenced in a second re-assessment, within that component, will not aggregate towards the final EPA grade (thus the second reassessment is capped at Pass).

The timescale for any reassessment will be agreed on a case-by-case basis, with Pearson. Retests/resubmissions must not provide an apprentice with an unfair advantage over others.

If the apprentice fails to meet all the Pass criteria within a component after either their initial or first reassessment attempt, it is expected that the centre submits a request for relevant retakes, by booking another EPA, specifying that the EPA is a retake. Pearson will allocate another independent end-point assessor, as soon as possible, so as not to delay the process.



### 3 End-point assessment components

This section contains information for each component in the end-point assessment.

**The end-point assessments are shown in the order that they must be taken;** the Apprentice Showcase is taken first, then the Practical Observation, with the Professional Discussion taking place at the end.

Component 1: Apprentice Showcase

Component 2: Practical Observation

Component 3: Professional Discussion

## Component 1: Apprentice Showcase

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### Purpose

The Apprentice Showcase is a summative portfolio in which apprentices will demonstrate, with the support of appropriate work-based evidence, how they have applied and used the identified knowledge, skills and behaviours to the required standards in their everyday work practice.

The Apprentice Showcase is compiled against an assessment brief produced by Pearson. The *Apprentice Showcase Brief*, which is in the *Pearson Level 2 End-point Assessment for Customer Service Practitioner - Additional Resources* document, is based on the Pass and Distinction grade criteria published in the apprenticeship assessment plan and requires apprentices to:

- demonstrate their knowledge and understanding of the principles and practices underpinning the apprenticeship standard and how these are applied in their employment context
- provide work-based evidence to demonstrate their competencies in:
  - using relevant systems, equipment and technology to deliver customer service
  - identifying and meeting customers' needs
  - dealing with customer challenge and conflict
  - working with others
  - organising their work and managing own personal development.

The *Apprentice Showcase Brief* shows how these requirements map to the Pass and Distinction criteria outlined on *pages 17-22*.

The Apprentice Showcase will assess the following modules and outcomes from the apprenticeship standard:

Modules	Apprenticeship standard outcomes
Understanding the organisation	<ol style="list-style-type: none"><li>1 Know the purpose of the business and what 'brand promise' means</li><li>2 Know your organisation's core values and how they link to the service culture</li><li>3 Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation.</li></ol>

Modules	Apprenticeship standard outcomes
<b>Meeting regulations and legislation</b>	<ol style="list-style-type: none"> <li>1 Know the appropriate legislation and regulatory requirements that affect your business</li> <li>2 Know your responsibility in relation to this and how to apply it when delivering service</li> </ol>
<b>System and resources</b>	<ol style="list-style-type: none"> <li>1 Know how to use systems, equipment and technology to meet the needs of your customers</li> <li>2 Understand types of measurement and evaluation tools available to monitor customer service levels</li> </ol>
<b>Product and service knowledge</b>	<ol style="list-style-type: none"> <li>1 Understand the products or services that are available from your organisation and keep up to date</li> </ol>
<b>Influencing skills</b>	<ol style="list-style-type: none"> <li>1 Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation</li> </ol>
<b>Personal organisation</b>	<ol style="list-style-type: none"> <li>1 Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines</li> </ol>
<b>Dealing with customer conflict and challenge</b>	<ol style="list-style-type: none"> <li>1 Demonstrate patience and calmness</li> <li>2 Show you understand the customer's point of view</li> <li>3 Use appropriate signposting or resolution to meet your customers' needs and manage expectations</li> <li>4 Maintain informative communication during service recovery</li> </ol>
<b>Developing self</b>	<ol style="list-style-type: none"> <li>1 Take ownership for keeping your service knowledge and skills up to date</li> <li>2 Consider personal goals and propose development that would help achieve them</li> </ol>
<b>Being open to feedback</b>	<ol style="list-style-type: none"> <li>1 Act on and seek feedback from others to develop or maintain personal service skills and knowledge</li> </ol>
<b>Team working</b>	<ol style="list-style-type: none"> <li>1 Frequently and consistently communicate and work with others in the interest of helping customers efficiently</li> <li>2 Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice</li> </ol>

## Format

The table below gives information about the context, duration and grading of the Apprentice Showcase.

Context	Apprentices will compile a summative portfolio to meet the requirements of the <i>Apprentice Showcase Brief</i> in the <i>Pearson Level 2 End-point Assessment for Customer Service Practitioner Additional Resources</i> document. Apprentices are required to complete three tasks for the assessment. Evidence for Task 1 and 2 may be provided in a variety of ways. Evidence for Task 3 must be based on relevant and appropriate work-based evidence, which is selected prior to the start of the EPA period. Apprentices, with guidance from their employer and/or training provider will select this evidence from the on-programme portfolio before the end-point assessment period.
Duration	Approximately 10 hours, of which the last 2 hours are supervised. Where there are gaps in evidence, the apprentice will have up to one hour spent in Q&A with the IEA, on the day of the EPA.

## Apprenticeship standard and content

The principles, concepts and practices underpinning the Apprenticeship Standard outcomes to be assessed in the Apprentice Showcase are detailed in the *Pearson Level 2 End-point Assessment for Customer Service Practitioner – Additional Resources* document.

Apprentices need to have a good understanding of these principles, concepts and practices in order to be able to interpret the tasks in the *Apprentice Showcase Brief* and provide the required evidence.

In delivering the content, during the on-programme period, it is important that trainers/tutors demonstrate the real-world application of the principles, concepts and practices by relating them to apprentices' employment context and where appropriate, other relevant organisational contexts. Apprentices must be able to apply the principles and concepts in the context of their organisation and their own job role.

Training and delivery approaches such as coaching, mentoring, shadowing, reflective practice, collaboration and consultation will be useful in structured on-the-job training to help apprentices develop the knowledge, skills and behaviours linked to this assessment.

## Apprentice Showcase delivery and conduct

This section provides information on the conditions for completing the Apprentice Showcase assessment. Centres must share this information with their apprentices before end-point assessment is undertaken.

### Preparation for the apprentice showcase assessment

Centres must ensure that apprentices are ready and suitably prepared to undertake the Apprentice Showcase assessment. This includes ensuring that apprentices:

- 1 have access to the *Apprentice Showcase Brief* in the *Pearson Level 2 End-point Assessment for Customer Service Practitioner – Additional Resources* document and that they fully understand the apprenticeship standard outcomes, the Pass and Distinction grade criteria and related evidence requirements. As a part of the preparation for end-point assessment, it is advisable for trainers/tutors to review and clarify, as necessary, the evidence requirements to ensure apprentices understand what they need to do and how.
- 2 have selected suitable work-based evidence from their on-programme portfolio for Task 3 prior to the start of the end-point assessment period; this is the only aspect of the assessment that can be done before the start of the end-point assessment period. Suitable forms of evidence for Task 3 could include audio and/or video-recordings; observation records of work performance, performance reviews documentation, one-to-one meeting notes, documented coaching feedback, customer feedback and work products/outputs from real work. Where witness testimony is used as evidence, it must be supported by other forms of evidence; it cannot be used as the sole evidence to demonstrate competence. Observation records should provide comments on how the observed performance shows achievement of the relevant grade criteria and evidence requirements and should be sufficiently detailed to enable the independent end-point assessor to make a judgement about the quality and sufficiency of the performance.

The employer and/or training provider should support apprentices to ensure that the selected forms of work-based evidence allow them to provide all the evidence required to achieve the Pass and Distinction grade criteria; please refer to the evidence requirements in the *Pearson Level 2 End-point Assessment for Customer Service Practitioner Additional Resources* document. Apprentices need to be mindful of issues of confidentiality and data protection in the use of work-based evidence.

- 3 understand how to and have practice in presenting and reflecting on their work-based evidence, including how to use their evidence holistically to meet the requirements.
- 4 know when the assessment period begins and when they will need to submit their evidence.

## Supervision requirements

- 5 The Apprentice Showcase assessment must be completed and submitted before the other end-point assessment components.
- 6 It is anticipated that apprentices will require approximately 10 hours to complete the assessment. This is intended to act as a guide to help employers and trainers/tutors plan for the assessment; apprentices can take more or less time to complete depending on their needs.
- 7 Once apprentices have started working on the assessment, trainers/tutors can only provide general feedback or clarification of the grade criteria, evidence requirements, task brief, expected behaviours or confirmation of deadlines. Trainers/tutors **must not** provide feedback on the quality of evidence or suggest improvements to apprentices' work, or confirm the achievement of any grade criteria.
- 8 Apprentices must produce evidence independently; the evidence they submit must be their own.
- 9 Regardless of the number of hours allowed for completing the assessment, the last two hours of this time must be supervised, where apprentices are in the direct sight of the supervisor. The supervisor may be their trainer/tutor. The date of the supervised period must be discussed with the end-point assessor during planning and scheduling.
- 10 Apprentices must continue to produce their assessment evidence during the supervised period and can have access to the internet and other organisational-specific resources.

## Submitting assessment evidence

- 11 At the end of the two-hour supervised period, apprentices must submit their evidence for all three tasks to the supervisor. Evidence may be submitted electronically or in hard copy. Apprentices also have the option of submitting their evidence by delivering a presentation, which must be recorded and the recording submitted with any supporting presentation slides. The presentation can be delivered to the trainer/employer or to the independent end-point assessor, depending on the specific arrangements made during the planning and scheduling meeting. To ensure fairness and consistency, trainers/tutors or end-point assessors **must not** question or probe apprentices' evidence during or after the presentation. Where presentations are being delivered to the trainer/tutor, this should be done during the 2-hour supervised period.
- 12 Work started but not submitted at the end of the supervised period will not be eligible for submission unless due to exceptional circumstances outside of their control. In these cases, apprentices may be eligible for special consideration (see *Section 6* for further information).

- 13 Submitted evidence must be accompanied by a declaration of authenticity (*Annexe C*), which must be signed and dated by the apprentice to declare the work is solely theirs and by their trainer/tutor to confirm that it was produced under the required conditions.
- 13 After submission, apprentices' evidence must be stored securely by the centre in a locked cupboard/cabinet or electronically on a secure drive on a computer. Apprentices' evidence must then be handed over directly to the end-point assessor or transferred electronically using the secure file transfer method agreed with Pearson.
- 14 The independent end-point assessor will then assess apprentices' evidence against the grade criteria and evidence requirements in the *Pearson Level 2 End-point Assessment for Customer Service Practitioner – Additional Resources* document.

### **Showcase Q&A session**

- 15 If the Independent End-point Assessor (IEA) identifies any gaps in evidence and/or that grade criteria has not been fully met, the IEA will facilitate a Q&A session with the apprentice to draw out additional evidence. The Q&A session will last no more than one hour.
- 16 The Q&A session:
- should not be used as the apprentice's primary source of evidence for the Showcase
  - should not be used to focus on **incorrect** evidence.
- 17 The decision whether to facilitate a Q&A session is at the discretion of the IEA.



## Assessing performance

Apprentices must produce their evidence for this assessment against the *Apprentice Showcase Brief*.

The independent end-point assessor will assess the apprentice's submitted evidence against the requirements in the Apprentice Showcase Brief and the grade criteria and related evidence requirements, for each task. Both the *Apprentice Showcase Brief* and the evidence requirements as provided in the *Pearson Level 2 End-point Assessment for Customer Service Practitioner – Additional Resources* document. The grade criteria are detailed below.

No other sources of information will be used to make judgements about the quality and sufficiency of the apprentice's evidence. Evidence requirements are provided for grade criteria only where it necessary to clarify the evidence expected.

Task 1	
Grade criteria	
Pass	Distinction
<b>1A</b> State the aims of the organisation in relation to its sector.	
<b>1B</b> State what is meant by the organisation's 'brand promise'.	
<b>1C</b> Explain how the organisation's core values relate to its service culture.	

Task 1 (continued)	
Grade criteria	
Pass	Distinction
<b>1D</b> Explain the difference between the features and benefits of products and/or services in relation to the organisation.	
<b>1E</b> Describe the measures and evaluation tools used in the organisation to monitor customer service levels.	
<b>1F</b> Explain how the relevant legislation and regulations affect the organisation's customer service provision.	<b>1G</b> Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations.
	<b>1H</b> Explain how a code of practice or ethical standards affects customer service.

Task 2	
Grade criteria	
Pass	Distinction
<b>2A</b> State their responsibilities for keeping information confidential in the organisation.	
<b>2B</b> State the responsibilities of employees and employers under the Health and Safety at Work Act.	
<b>2C</b> State the purpose of different organisational policies and procedures that affect their customer service role.	<b>2E</b> Explain how the organisational policies and procedures impact on the delivery of customer service
	<b>2F</b> Explain why it is important to update their knowledge on the organisation's products and/or services.
<b>2D</b> Describe the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment.	

Task 3	
Grade criteria	
Pass	Distinction
<b>3A</b> Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation.	<b>3U</b> Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached.
<b>3B</b> Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs.	
<b>3C</b> Handle customer objections in a positive and professional manner.	
<b>D</b> Maintain calm and patience at all times when dealing with challenging customer situations.	<b>3V</b> Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.
<b>3E</b> Demonstrate sensitivity to, and interest in, the customers' concerns.	
<b>3F</b> Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers.	
<b>3G</b> Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures.	

Task 3 (continued)	
Grade criteria	
Pass	Distinction
<b>3H</b> Keep customers informed of progress while resolving issues.	
<b>3I</b> Maintain accurate record of customer issues and progress to resolution.	
<b>3J</b> Prioritise and plan the completion of tasks according to agreed deadlines.	<b>3W</b> Respond in a professional manner to challenges and changes and adjust priorities accordingly.
<b>3K</b> Use appropriate tools and techniques to monitor the progress of tasks to completion.	
<b>3L</b> Work with others in a positive and productive manner.	<b>3X</b> Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers.
<b>3M</b> Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently.	

Task 3 (continued)	
Grade criteria	
Pass	Distinction
<b>3N</b> Share personal learning and information with others to support good customer service practice.	<b>3Y</b> Present reasoned ideas for improving customer service practice to the appropriate colleagues.
<b>3O</b> Seek constructive feedback about their customer service skills and knowledge from others.	
<b>3P</b> Use feedback from others to develop their customer service skills and knowledge.	
<b>3Q</b> Conduct a self-assessment to identify their strengths and weaknesses in relation to the job role.	<b>3Z</b> Review the effectiveness of their personal development plan and update it accordingly.
<b>3R</b> Produce a personal development plan to support the achievement of their agreed learning and development goals.	
<b>3S</b> Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively.	
<b>3T</b> Describe how to maintain their knowledge of the organisation's products and/or services.	

## Component 2: Practical Observation

### Purpose

The Practical Observation involves apprentices being observed interacting with customers in face-to-face or non-face-to-face situations in their normal place of work. The primary purpose of the Practical Observation is to assess the apprentice's ability to use a range of interpersonal and communication skills and behaviours to recognise, respond and manage their customers' needs and expectations.

The Practical Observation will be pre-planned with the apprentice, their line manager/employer and the independent end-point assessor, and should be scheduled for a time when the apprentice would have sufficient interactions with customers to enable them to demonstrate the required skills, knowledge and behaviours to meet the performance requirements, which are detailed on *pages 28–31*.

The Practical Observation will assess the following modules and outcomes of the apprenticeship standard.

Modules	Apprenticeship standard outcomes
Interpersonal skills	1 Use a range of questioning skills, including listening and responding in a way that builds rapport, determines customer needs and expectations and achieves positive engagement and delivery.
Communication	<div>1 Depending on your job role and work environment:<div><div>a Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or</div><div>b Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions.</div></div></div> <div>2 Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand.</div>

Modules	Apprenticeship standard outcomes
Equality – treating all customers as individuals	<ol style="list-style-type: none"> <li>1 Treat customers as individuals to provide a personalised customer service experience.</li> <li>2 Uphold the organisation’s core values and service culture through your actions.</li> </ol>
Presentation – dress code, professional language	<ol style="list-style-type: none"> <li>1 Demonstrate professional pride in the job through appropriate dress and positive and confident language.</li> </ol>
‘Right first time’	<ol style="list-style-type: none"> <li>1 Use communication behaviours that establish clearly what each customer requires and manage their expectations.</li> <li>2 Take ownership from the first contact and then take responsibility for fulfilling your promise.</li> </ol>

## Format

The table below gives information about the context, duration and availability of the observation.

Context	<p>The apprentice will be observed in their normal work environment interacting with customers in the delivery of customer service. Apprentices must have access to the necessary equipment, resources and technology to carry out their role as required.</p> <p>It is expected that apprentices will be observed interacting with at least two different customers during the assessment period.</p>
Duration	Minimum 1 hour.



## Apprenticeship standard and content

The principles, concepts and practices underpinning the Apprenticeship Standard outcomes to be assessed in the Practical Observation are detailed in the *Pearson Level 2 End-point Assessment for Customer Service Practitioner – Additional Resources* document.

In order to provide sufficient and valid evidence to meet the performance requirements during the observation assessment, apprentices need to have a good understanding of these principles, concepts and practices, and sufficient time to practise using them in their customer service delivery.

Training and delivery approaches, such as coaching, mentoring, shadowing, reflective practice, collaboration and consultation, will be useful in structured on-the-job learning to help apprentices develop the knowledge, skills and behaviours linked to this assessment.

## Practical Observation delivery and conduct

This section provides information on how the observation will be conducted and how apprentices are expected to interact with the assessment process. It is important that this information is shared with apprentices before they undertake the assessment.

- 1 The Practical Observation assessment will take place in apprentices' normal working environment at a time where they are actively interacting with customers, either in face-to-face or non-face-to-face situations. Apprentices must be informed by their employer when the observation will take place. The observation will be carried out by the independent end-point assessor.
- 2 The Practical Observation must be arranged for a period where apprentices will have sufficient interactions with customers to enable them to meet the performance requirements on *pages 28-31*. It is expected that apprentices will be observed interacting with at least two different customers during the observation assessment period. Employers need to consider and take necessary steps to ensure compliance with relevant regulations such as data protection legislation during the assessment.
- 3 If the presence of the end-point assessor will become obtrusive then the observation can be done at a distance (e.g. not in the same room) with the use of suitable technology. This will need to be discussed and agreed as a part of the EPA planning and scheduling process.
- 4 The Practical Observation is for a minimum of one hour. If at the end of the hour, an apprentice has not had the opportunity to meet all the performance requirements then the assessment period is to be extended to allow more time. The extended time period is at the discretion of the employer and the independent end-point assessor but it should not be more than 30 minutes; a maximum total observation assessment time of one hour and thirty minutes (1hr 30 mins).
- 5 Depending on the assessment context, there may not always be the opportunity to observe evidence for some performance requirements, even after the extended assessment period. These performance requirements are marked with asterisks (\*\*) on *pages 28-31*. Where this is the case, then these performance requirements are to be evidenced through work-based evidence presented by apprentices after the live observation. This alternative assessment is allowable only for the identified performance requirements – all other performance requirements must be evidenced through the observation.

- 6 All apprentices must have prepared appropriate work-based evidence for the alternative assessment before the observation takes place and must have it ready in case it is needed. Work-based evidence used for Task 3 in the Apprentice Showcase assessment may be used to evidence these performance requirements as long as it is relevant and sufficient. *Annexe B* in *The Pearson Level 2 End-point Assessment for Customer Service Practitioner Additional Resources* document indicates where evidence used for Task 3 in the Apprentice Showcase may be suitable to demonstrate achievement of these performance requirements. The apprentice is not expected to provide a different piece of evidence for each performance requirement; they should consider using a single piece of evidence holistically across multiple performance requirements, where appropriate. Where witness testimony is used as evidence, it must be supported by other forms of evidence; it cannot be used as the sole evidence to demonstrate competence.
- 7 It is the responsibility of apprentices and their employer and/or training provider to ensure that the evidence selected is appropriate and sufficient to meet the performance requirements. Apprentices will need to talk through what their work-based evidence represents in order to demonstrate to the end-point assessor how they meet the performance requirements that were not observed.
- 8 The independent end-point assessor will judge apprentices' performance against the Pass and Distinction performance requirements on *pages 28-31*.
- 9 The independent end-point assessor will make notes while conducting the observation to support assessment decisions and for verification purposes.
- 10 At the end of the observation assessment, the end-point assessor will determine the number of Pass and Distinction grade criteria met by apprentices through the demonstration of the associated performance requirements. Please see *Annexe A*, which shows the relationship between the grade criteria and the performance requirements. The number of Pass and Distinction criteria achieved in the Practical Observation will then be combined with those achieved in the other two end-point assessments to determine the overall end-point assessment grade. Please refer to *page 5* for details on the end-point assessment overall grading.

## Assessing performance

The independent end-point assessors will assess apprentices' performance in the Practical Observation using the pass and distinction performance requirements shown below. These performance requirements express the Pass and Distinction grade criteria for the Practical Observation as observable skills and behaviours to enable consistent and reliable assessment. A tick (✓) indicates whether each is a pass or a distinction requirement.

No other sources of information will be used to make judgements about the quality and sufficiency of the apprentices' evidence.

Ref. no.	Performance requirements	Pass	Distinction
<b>Personal presentation and professionalism</b>			
<b>1</b>	Maintain organisational standards of personal presentation and professional behaviour <b>(face-to-face)</b>  <b>OR</b> Demonstrate a welcoming and professional approach <b>(non-face-to-face)</b>	✓	
<b>Engaging and communicating with customers effectively</b>			
<b>2</b>	Make initial contact with customers in a confident and positive manner	✓	
<b>3</b>	Use questioning skills and techniques appropriate to the situation effectively	✓	
<b>4</b>	Use active listening skills appropriate to the situation effectively	✓	
<b>5</b>	Use non-verbal communication and behaviours appropriately to deliver a positive customer experience <b>(face-to-face)</b>  <b>OR</b> Present a positive attitude and use an approachable tone of voice to deliver a positive customer experience <b>(non-face-to-face)</b>	✓	

Ref. no.	Performance requirement	Pass	Distinction
<b>Engaging and communicating with customers effectively (continued)</b>			
6	Adapt tone of voice, behaviour and language as appropriate to meet the specific needs of customers protected under the Equality Act **		✓
7	Speak clearly and politely to customers ( <b>face-to-face</b> )  <b>OR</b> Communicate clearly and politely with customers ( <b>non-face-to-face</b> )	✓	
8	Use clear, positive and professional language to customers	✓	
9	Use appropriate communication and interpersonal skills to interact effectively with different customer personalities, remaining calm and in control**		✓
10	Communicate in a manner that reflects the organisation's brand and procedures**		✓
<b>Establishing and meeting customers' needs and expectations and providing a customer-focused experience</b>			
11	Seek information on customers' needs and expectations	✓	
12	Use summarising and/or reinforcement techniques appropriately in establishing and confirming customers' needs	✓	
13	Adapt tone of voice, behaviour and body language as appropriate to meet individual customers' needs and expectations ( <b>face-to-face</b> )  <b>OR</b> Adapt tone of voice and behaviour to meet, as appropriate, to meet individual customers' needs and expectations ( <b>non-face-to-face</b> )	✓	
14	Provide accurate information on products and/or services that meet customers' needs	✓	

Ref. no.	Performance requirement	Pass	Distinction
<b>Establishing and meeting customers' needs and expectations and providing a customer-focused experience (continued)</b>			
15	Offer workable options that balance the needs of customers with the needs of the organisation and that are within own level of authority**		✓
16	Confirm that customers' needs and expectations have been met	✓	
17	Explain reasons clearly and politely to customers when their needs cannot be met**	✓	
18	Remain calm, positive and professional if customer situations become challenging**	✓	
19	Follow organisational policy and procedures, legal and ethical requirements when providing customer service	✓	
<b>Taking ownership for resolving customers' issues</b>			
20	Explain clearly to customers when they are unable to resolve issues beyond their level of authority**	✓	
21	Discuss and agree solutions to issues with customers and/or relevant colleagues**	✓	
22	Take appropriate actions to implement agreed solutions**	✓	
23	Work with others and customers to make sure that any promises are kept**	✓	
24	Keep customers fully informed about what is happening to resolve the issue**	✓	
25	Check with customers to make sure the issue has been resolved to their satisfaction**	✓	
26	Explain reasons to customers and refer them to other sources if the issue cannot be resolved satisfactorily**	✓	
<b>Working with others to deliver effective customer service</b>			
27	Work willingly with colleagues in the delivery of customer service**	✓	

Ref. no.	Performance requirements	Pass	Distinction
<b>Working with others to deliver effective customer service (continued)</b>			
<b>28</b>	Share sound ideas for improving customer service delivery**	✓	
<b>29</b>	Use own initiative to provide help and support to colleagues in the delivery of customer service**		✓

*Annexe A* shows how these pass and distinction performance requirements relate to the achievement of the Pass and Distinction grade criteria.

## Component 3: Professional Discussion

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### Purpose

The Professional Discussion is a planned structured discussion between the apprentice and the independent end-point assessor. The purpose is to assess apprentices' knowledge and understanding of specific areas of the apprenticeship standard and their ability to apply this in carrying out their role as a customer service practitioner in their organisation.

The Professional Discussion will assess the following modules and outcomes of the apprenticeship standard.

Modules	Apprenticeship standard outcomes
Knowing your customers	<ol style="list-style-type: none"><li>1 Understand who customers are</li><li>2 Understand the difference between internal and external customers</li><li>3 Understand the different needs and priorities of your customers and the best way to manage their expectations, recognising and knowing how to adapt style to be highly effective</li></ol>
Your role and responsibility	<ol style="list-style-type: none"><li>1 Understand your role and responsibility within your organisation and the impact of your actions on others</li><li>2 Know the targets and goals you need to deliver against</li></ol>
Customer experience	<ol style="list-style-type: none"><li>1 Understand how establishing the facts enable you to create a customer-focused experience and appropriate response</li><li>2 Understand how to build trust with a customer and why this is important</li></ol>



## Format

Structure	Apprentices will be asked a series of questions by the independent end-point assessor. The questions are based on the standard outcomes above and are targeted to elicit the evidence to meet the Pass and Distinction grade criteria and related evidence requirements. The evidence requirements are detailed in the <i>Pearson Level 2 End-point Assessment for Customer Service Practitioner – Additional Resources</i> document. For some questions, apprentices will be required to provide work-based examples of how they have applied the knowledge and understanding in carrying out their job role.
Duration	Maximum 1 hour.

## Apprenticeship standard and content

The principles, concepts and practices underpinning the Apprenticeship Standard outcomes to be assessed in the Professional Discussion are detailed in the *Pearson Level 2 End-point Assessment for Customer Service Practitioner – Additional Resources* document.

In delivering the content, it is important that trainers/tutors demonstrate the real-world application of the concepts and principles by relating them to the apprentices' employment context and, where appropriate, other relevant organisational contexts. Apprentices must be able to apply the principles and concepts in the context of their organisation and their own job role, and must be able to provide practical examples to show how they have applied them.

## Professional Discussion delivery and conduct

This section provides information on how the Professional Discussion will be conducted and how apprentices are expected to interact with the assessment process. It is important that this information is shared with apprentices before they undertake the assessment.

- 1 The Professional Discussion will last for a maximum of 1 hour and may be conducted virtually or face-to-face, depending on the agreement with the employer.
- 2 Apprentices must not share details of the questions or evidence to be provided with others.
- 3 The discussion will be facilitated by an independent end-point assessor who will use a series of questions to focus and guide the discussion with the apprentice. The questions are designed to draw out the evidence required to meet the Pass and Distinction grade criteria detailed on *pages 36–39*.
- 4 The discussion will take place in a quiet place away from the apprentice's everyday working environment with no interruptions or distractions. Apprentices will be informed of the location, by their employer, before the time of the assessment.
- 5 For some questions, apprentices will be asked to provide real work-based examples of how they have applied the principles and concepts related to the apprenticeship standards in their work practice. In providing these practical examples, apprentices need to be as specific and detailed as possible in their description; they must provide sufficient detail of the context of the situation and the actions they have taken.
- 6 Apprentices need to be mindful of issues of confidentiality and data protection when providing real work examples.
- 7 The independent end-point assessor will make notes of the evidence provided by apprentices during the discussion and the discussion will be audio recorded to support assessment decisions and for verification purposes.
- 8 After the professional discussion, the independent end-point assessor will review the apprentices' evidence against the Pass and Distinction grade criteria and related evidence requirements and determine the Pass and Distinction grade criteria achieved by each apprentice. The grade criteria are detailed on *pages 36–39* and the evidence requirements are detailed in the *Pearson Level 2 End-point Assessment for Customer Service Practitioner – Additional Resources* document.
- 9 The number of Pass and Distinction criteria achieved in the Professional Discussion will then be combined with those achieved in the other two end-point assessments to determine the overall end-point assessment grade. Please refer to *page 5* for details on the end-point assessment overall grading.

## Assessing performance

The independent end-point assessor will assess apprentices' evidence from the Professional Discussion using the grade criteria on the following pages and the related evidence requirements. No other sources of information will be used to make judgements about the quality and sufficiency of apprentices' evidence.

Module: Knowing your customers		
Standard outcomes	Pass criteria	Distinction criteria
<b>1</b> Understand who customers are <b>2</b> Understand the difference between internal and external customers	<b>1A</b> Explain the difference between internal and external customers in the context of their organisation	
		<b>2A</b> Explain the difference in the way internal and external customer relationships are managed
		<b>2B</b> Explain the importance of building good customer relationships to the organisation
<b>3</b> Understand the different needs and priorities of your customers and the best way to manage their expectations, recognising and knowing how to adapt style to be highly effective	<b>3A</b> Describe the specific needs of different customers, including those protected under current equality law	

Module: Knowing your customers		
Standard outcomes	Pass criteria	Distinction criteria
	<b>3B</b> Explain when and how to adapt their service approach to meet the needs and expectations of customers	
		<b>3C</b> Explain the importance of balancing the needs of both the organisation and its customers

Module: Your role and responsibility		
Standard outcomes	Pass criteria	Distinction criteria
<b>4</b> Understand your role and responsibility within your organisation and the impact of your actions on others	<b>4A</b> Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation	
<b>5</b> Know the targets and goals you need to deliver against	<b>5A</b> Describe how to achieve their agreed targets and goals	

Module: Customer experience		
Standard outcomes	Pass criteria	Distinction criteria
<b>6</b> Understand how establishing the facts enable you to create a customer focused experience and appropriate response	<b>6A</b> Explain how an understanding of the facts can be used to create a customer-focused experience	
		<b>6B</b> Explain how to respond to customer needs and requirements positively
<b>7</b> Understand how to build trust with a customer and why this is important	<b>7A</b> Explain how to build trust with customers and the importance of doing so	

## 4 Contact us

We have a dedicated Account Support team, across the UK, to give you more personalised support and advice. To contact your Account Specialist:

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**Telephone:** 0844 576 0045

If you are new to Pearson and would like to become an approved centre, please contact us by:

**Email:** wbl@pearson.com

**Telephone:** 0844 576 0045



## Annexe A: Mapping of Practical Observation grade criteria to the Performance requirements

Pass grade criteria	Pass performance requirement (reference number)
Demonstrate willingness and ability to engage with customers in a positive manner using relevant interpersonal skills	<b>2, 3, 4, 5, 7 &amp; 8</b>
Work with customers to build a rapport, recognising and where possible meeting their needs and expectations	<b>2, 3, 4, 5, 7, 8, 11, 12, 13, 14 &amp; 16</b>
Show willingness to work with others and share ideas where appropriate	<b>27 &amp; 28</b>
Demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills <b>(face-to-face)</b> <b>OR</b> Demonstrate ability to make initial contact and make use of appropriate communication skills <b>(non-face-to-face)</b>	<b>2, 3, 4, 5, 7 &amp; 8</b>
Adapt tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations <b>(face-to-face)</b> <b>OR</b> Adapt tone and behavior when necessary, recognising and confirming understanding of needs and expectations <b>(non-face-to-face)</b>	<b>12 &amp; 13</b>

Pass grade criteria	Pass performance requirements (reference number)
<p>Demonstrate ability to recognise when to summarise and the techniques to use <b>(face-to-face)</b></p> <p><b>OR</b></p> <p>Demonstrate ability to recognise and use reinforcement techniques during customer interactions <b>(non-face-to-face)</b></p>	<b>12</b>
Recognise and respond to individual needs to provide a personalised customer service experience	<b>11, 12, 13, 14 &amp; 16</b>
Behave in a way that upholds the core values and service culture of the organisation	<b>1, 5, 14, &amp; 19</b>
<p>Present a professional image in line with the organisational dress code and code of conduct <b>(face-to-face)</b></p> <p><b>OR</b></p> <p>Demonstrate a positive attitude and welcoming approach consistently when dealing with customers</p>	<p><b>1</b></p> <p><b>1 &amp; 5</b></p>

Pass grade criteria	Pass performance requirements (reference number)
Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging	<b>2, 17 &amp;18</b>
Maintain professional and positive language consistently in customer interactions <b>(non-face-to-face only)</b>	<b>8</b>
They will show an ability to establish needs and expectations, working towards meeting them where possible, explaining when necessary when they cannot be met	<b>3, 4, 11, 12, 14, 16 &amp;17</b>
Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures	<b>14 &amp; 19</b>
Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers	<b>19 &amp; 20</b>
Take ownership from beginning to end, building and maintaining a relationship with the customer	<b>21, 22, 23 &amp;24</b>
Recognise the importance of good customer service to the customer and, in turn, the organisation, making contact as promised, referring to others as necessary with all required detail, following up to ensure conclusion	<b>24,25 &amp;26</b>

Distinction grade criteria	Distinction performance requirements (reference number)
Demonstrate ability to adapt interpersonal skills when working on meeting the needs and expectations of different customers, showing knowledge of the application of the Equality Act when communicating	<b>6</b>
Demonstrate ability to balance the needs and expectations of the customer with that of the organisation	<b>15</b>
Proactively work with others to ensure efficient customer service delivery	<b>29</b>
Demonstrate ability to adapt communication – tone, behaviour and language – to different customers and their interactions, showing clear knowledge of the application of the Equality Act 2010 in all customer handling	<b>6</b>
Demonstrate ability to flex to various customer personalities, while remaining calm and in control where necessary. They will also demonstrate that they know the organisational procedures to be followed in all communication and the importance to the brand/organisation of this requirement	<b>9 &amp; 10</b>

## Annexe B: Gateway Declaration Form

Apprentice Name:			
ULN:			
Gateway Date:			
<b>Pre-requisite Evidence</b>	<b>Y/N</b>	<b>Comments/description of evidence (if applicable)</b>	
English and Maths certificates (L1 or above)			
English and Maths (L2) taken			
<b>Evidence requirements for the apprentice's organisation</b> Please list any other evidence reviewed as part of the gateway process			
<b>Employer declaration</b> I confirm that the apprentice has achieved the occupational knowledge, skills and behaviours required to achieve the apprenticeship. The apprentice has achieved the pre-requisites listed above, and is ready for their end-point assessment.  Name: _____ Date: _____  Signature: _____			
<b>Apprentice declaration</b> I confirm the gateway evidence is my own and agree to be put forward for the EPA.  Signature: _____ Date: _____			

## Annexe C: Apprentice Showcase Authentication and Certification Declaration form

When submitting evidence for the Apprentice Showcase, including resubmissions, each apprentice and their trainer/tutor must sign this declaration form. The apprentice should also confirm that they give permission for their overall apprenticeship certificate to be claimed upon satisfactory completion of the other two end-point assessment components.

Apprentice name:		
Pearson registration number:		
Submission type: (first or re-take)	Submission date:	Submission time:

**Apprentice declaration**

a) I certify that the work submitted for this showcase is my own. I have clearly referenced any sources used in the work. I understand that false declaration is a form of malpractice.

b) I give my permission for Pearson to claim for my overall apprenticeship certificate, following confirmation of my successful achievement of this EPA.

Apprentice signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Tutor/trainer declaration**

I confirm that the work presented for the individual showcase is the apprentice's own.

I confirm that the work was completed under the specified conditions and context, and the apprentice's evidence is authentic.

Tutor/trainer name: \_\_\_\_\_

Tutor/trainer signature: \_\_\_\_\_ Date: \_\_\_\_\_

**October 2018**

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