Customer Service Practitioner Apprenticeship Standard

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Sector Manager Business Technical and Professional

May 2017
What is the purpose of today?

1. Introductions
2. The new Apprenticeship Standard
3. On-programme support?
4. End Point Assessment
5. Why work with Pearson
What’s changing?

Comparison between SASE Frameworks and new standards

**SASE Frameworks**
(Multi-occupational)

- Initial assessment
- **On-the-job and off-the-job training including:**
  - NVQ and Technical Certificate
  - Maths and English
  - Personal Learning & Thinking Skills (PLTS)
  - Employment Rights and Responsibilities (ERR)
- Completion and certification
- Occupational competence

**New apprenticeship standards**
(Single standard per job role/occupation)

- Initial assessment
- **On-the-job and off-the-job training including:**
  - Qualifications not mandatory – defined in standard assessment plan – optional qualifications could be built by provider/assessment organisation
  - Maths and English
  - Formative assessment of behaviours
- Gateway:
  - Employer and provider sign off learner ready for end-point assessment
- End-point assessment
- Completion and certification
- Occupational competence

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**Day 1**

- Initial assessment
- On programme learning
- Assessment Gateway
- Completion
- End Point Assessment
SASE Framework withdrawals

- Phased withdrawal of SASE apprenticeship frameworks where replacement apprenticeship standards that cover the same occupations


- The proposed last date for new starts on these frameworks is 31 March 2018
  - Customer Service (Level 2 and 3)
  - Management (Level 2, 3, 4 and 5)
  - Business and Professional Administration (Level 4)
  - Providing Financial Services (Level 3)

- Final list for withdrawal announced in May 2017. If withdrawal is deferred, the framework will be included in the next batch of proposed withdrawals.
Register of Apprenticeship Assessment Organisations

Pearson are an approved End Point Assessment Organisation for the following new apprenticeship standards:

- **Customer Service Practitioner**
- Financial Services Customer Adviser
- Senior Financial Services Customer Adviser
- Team Leader / Supervisor
- Operational / Departmental Manager
Customer Service Practitioner Level 2
Customer Service Practitioner Apprenticeship Standard

**Duration:** Minimum of twelve months

**Entry requirements:** Achievement of Level 1 Maths and English

### Knowledge
- Knowing your customers
- Understand the organisation
- Meeting regulations and legislation
- Systems and resources
- Your role and responsibility
- Customer experience
- Product and service knowledge

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

### Behaviours
- Developing self
- Being open to feedback
- Team working
- Equality – treating all customers as individuals
- Presentation – dress code, language
- Right first time
Customer Service Practitioner
End to End Delivery and Assessment

On Programme Learning
- Initial Assessment
- On Programme
- On The Job Training
- Off the Job Training
- Off the Job Training

End Point Assessment
- Learning and Development
- Assessment Gateway
- Apprentice Showcase
- Practical Observation & Professional Discussion
- Completion (cannot be achieved prior to 12 months)

English and Maths

Pearson
# Customer Service Practitioner Occupational Brief

<table>
<thead>
<tr>
<th>Module</th>
<th>Standard</th>
<th>What do I need to know</th>
<th>Pass Criteria</th>
<th>Distinction Criteria</th>
<th>Method of Assessment</th>
</tr>
</thead>
</table>
|        | 1. Understand who customers are | 1.1 Who are my customers?  
2.1 What is an internal customer?  
3.1 What is the purpose of customer service?  
4.1 Identify the specific needs that customers may have, including those that are protected under current equality law? | Explain the difference between internal and external customers in the context of their organisation | Explain the importance of building good relationships to the organisation | Professional Discussion |
|        | 1.2 Who are the organisations customers?  
2.2 What is an external customer?  
3.2 What are the different needs of your customers?  
4.2 Identify the specific needs that customers may have, including those that are protected under current equality law? | | | | |
|        | 1.3 Describe the different types of customers?  
2.3 Who are the organisations internal customers?  
3.3 What are the different priorities of your customers?  
4.3 Identify the specific needs that customers may have, including those that are protected under current equality law? | | | | |
|        | 2.4 Who are the organisations external customers?  
2.5 What is the difference between internal and external customers to the organisation? | | | | |
|        | 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 | 3.4 What are the different priorities of your customers?  
5.5 What is meant by customer expectations? | Describe the specific needs of different customers, including those protected under current Equality Law. | Explain the importance of balancing the needs of both the organisation and its customers. | |
|        | | 3.5 What is meant by customer expectations?  
6.6 How does the standard of customer service affect the success of your | | | |
|        | | | | | |
Customer Service Practitioner Grading Criteria

For each of the three assessment methods, all pass criteria (100%) must be achieved to progress and complete the apprenticeship.

**Apprentice Showcase**

70%
Minimum distinction criteria
The apprentice must achieve all pass criteria and a minimum of 7 out of 10 distinction criteria.

**Observation**

80%
Minimum distinction criteria
The apprentice must achieve all pass criteria and a minimum of 4 out of 5 distinction criteria.

**Professional Discussion**

75%
Minimum distinction criteria
The apprentice must achieve all pass criteria and a minimum of 3 out of 4 distinction criteria.
Qualifications to support on-programme

Landscape
• Qualifications are, in the main, non mandatory within ‘business’ apprenticeship standards
• Decision often driven by DFE/SFA as opposed to the employer choice

Action
• Pearson BTEC Level 2 Diploma in Customer Service mapped to the modules within the Customer Service Practitioner Standard

Solution
• Diploma can be used as ‘the vehicle’ to support a structured programme of teaching and learning and to support evidence generation
• Phased recognition during the apprenticeship
• Uploaded to website and password protected with customers EOL credentials
• Optional
Funding for qualifications

- Funding cannot be used for the registration/examination/certification costs of non-mandated qualifications.

- Funding can be used for some or all of the delivery where there is clear overlap between this training and the knowledge, skills and behaviours needed for the apprenticeship standard.

- Employers need to cover the costs of registration/examination/certification costs.

- Employers could cover costs of delivery where there is no overlap.
<table>
<thead>
<tr>
<th>Module</th>
<th>Standard</th>
<th>What do I need to know</th>
<th>Mapping to Pearson BTEC Level 2 Diploma in Customer Service (601/3424/0)</th>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating your customers</td>
<td>1.1 Describe the characteristics of challenging customers</td>
<td>Unit 2: 1.1 Explain the differences between internal and external customers</td>
<td>No coverage</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.2 Explain how to identify customers</td>
<td>Unit 1: 1.2 Explain the importance of developing relationships with customers</td>
<td>No coverage</td>
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<tr>
<td></td>
<td>1.3 Explain how to identify customers' needs and expectations</td>
<td>Unit 1: 1.3 Explain the importance of treating customers as individuals</td>
<td>Partially met</td>
<td></td>
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<tr>
<td></td>
<td>1.4 Identify the specific needs that customers may have</td>
<td>Unit 3: 3.2 Explain how to identify customers' needs and expectations</td>
<td>No coverage</td>
<td></td>
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<tr>
<td>Understanding the</td>
<td>2.1 Explain the differences between internal and external customers</td>
<td>Unit 2: 1.1 Explain the differences between internal and external customers</td>
<td>Fully met</td>
<td></td>
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<tr>
<td>differences between</td>
<td>2.2 Explain the importance of developing relationships with customers</td>
<td>Unit 1: 1.2 Explain the importance of developing relationships with customers</td>
<td>Fully met</td>
<td></td>
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<td>internal and external</td>
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<td>Fully met</td>
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<td>customers</td>
<td>2.4 Identify the specific needs that customers may have</td>
<td>Unit 3: 3.2 Explain how to identify customers' needs and expectations</td>
<td>Partially met</td>
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<td>No coverage</td>
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<td></td>
<td></td>
<td>Unit 1: 1.4 Explain the relationship between customers' needs and expectations and customer satisfaction</td>
<td>No coverage</td>
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<tr>
<td></td>
<td></td>
<td>Unit 3: 3.2 Explain how to identify customers' needs and expectations</td>
<td>No coverage</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Unit 3: 3.3 Explain the difference between customers' wants, needs and their expectations</td>
<td>No coverage</td>
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</table>
Assessment Gateway

**Purpose**
- Employer, apprentice and trainer/assessor involved
- Check that apprentice has achieved the knowledge, skills and behaviours outlined in the standard
- Is apprentice ready for End Point Assessment – opportunity to progress

**Checklist**
- Find an Assessment Organisation for EPA
- Decide what month the apprentice will be doing EPA
- Contact the Assessment Organisation and book EPA
End Point Assessment
Customer Service Practitioner Apprenticeship
Interpreting the End Point Assessment Specification

1. Apprentice Showcase
   - Apprenticeship standard
   - Standard outcomes
   - What are the skills, knowledge and behaviours being assessed?

2. Observation
   - Teaching and learning content
   - Content underpinning the standard outcomes
   - Principles, concepts and practices related to the apprentices' employment

3. Professional Discussion
   - Assessment delivery
   - Assessment conditions including assessment briefs
   - The rules for assessment

   - Grading criteria
   - Grading and evidence requirements
   - What I need to evidence to achieve a pass or distinction

Successful apprenticeship achievement and certification
Apprentice Showcase

The apprentice showcase is compiled after 12 months of on-programme learning. 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.

• 30 Pass Criteria and 10 Distinction Criteria

• Compiled against an assessment brief produced by Pearson

• Apprentices are required to complete three tasks.
  • Task one: Understanding your organisation
  • Task two: Understanding your role and responsibilities
  • Task three: Reflecting on own practice

• Expected to be completed within 8 hours including supervised and non supervised conditions

• Submitted electronically or hard copy. Apprentices also have the option of submission through a presentation
Observation

The practical observation will be pre-planned and scheduled to when the apprentice will be in their normal place of work and will be carried out by the Independent Assessor.

- 25 Pass Criteria and 5 Distinction Criteria
- Observed in their normal work environment interacting with at least two customers in the delivery of customer service, either in face-to-face or non-face-to-face situations.
- Approximately one-hour assessment period.
- If the presence of the end-point assessor will become obtrusive then the observation can be done at a distance with the use of technology.
- Where there is not always the opportunity to observe evidence these performance criteria will be evidenced through real work-based evidence presented by apprentices after the live observation. *(Apprentice Showcase Task 3)*
Professional Discussion

The professional discussion will be a structured discussion between the apprentice and the Independent Assessor, following the observation, to establish the apprentice’s understanding and application of knowledge, skills and behaviours.

• 7 Pass Criteria and 4 Distinction Criteria

• Apprentices will be asked a series of questions by the independent end-point assessor based on the standard outcomes and designed to draw out evidence against Pass and Distinction grade criteria

• Apprentices will be required to provide real-life examples of how they have applied the knowledge and understanding in carrying out their job role.

• A maximum of one-hour assessment period conducted face to face or virtually
## End Point Assessment Delivery Models

<table>
<thead>
<tr>
<th>Model</th>
<th>Description</th>
<th>Considerations</th>
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<tbody>
<tr>
<td>Direct Delivery</td>
<td>Procurement of “off the shelf” End Point Assessment for a specific Standard. End Point Assessment service covers all independent assessment requirements.</td>
<td>None</td>
</tr>
<tr>
<td>Partnership Delivery</td>
<td>Sub-contract the physical assessment elements to another organisation to utilise their assessor resources. Pearson would be accountable for the EPA and would provide all other aspects within its role (e.g. assessment tools, specification design, resources, standardisation, assessor training etc.)</td>
<td>Assessors must not be linked to any on-programme delivery of the apprentice</td>
</tr>
<tr>
<td></td>
<td>Pearson would verify the quality of the assessments and internal quality assurance within the provider/individual assessors</td>
<td>Assessors must be employed within a separate organisation or separate legal business entity (e.g. a separate organisation with a separate team to deliver assessments)</td>
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</table>
# Pricing Models

<table>
<thead>
<tr>
<th></th>
<th>Direct Delivery</th>
<th>Partnership Delivery</th>
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</thead>
<tbody>
<tr>
<td>End Point Assessment including</td>
<td>£550.00</td>
<td>£350.00</td>
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<tr>
<td>Qualification</td>
<td></td>
<td></td>
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<tr>
<td>End Point Assessment including</td>
<td>£577.80</td>
<td>£377.80</td>
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<tr>
<td>Qualification and Functional Skills</td>
<td></td>
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<tr>
<td>Maths &amp; English</td>
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- Both models include full access to Apprentice 360
End Point Assessment Registration
Case study – Customer Service

Sign a letter of intent

Registration on Edexcel Online

Book TWO months before EPA

EPA readiness form & Gateway evidence

IEA has a planning discussion

IEA checks Gateway evidence and undertakes EPA

IEA calculates final grade and submits to Pearson

End Point Assessment

After at least 12 months

Apprentice Showcase

Practical Observation & Professional Discussion

Completion (cannot be achieved prior to 12 months)
Why work with Pearson on the new apprenticeship standards?