



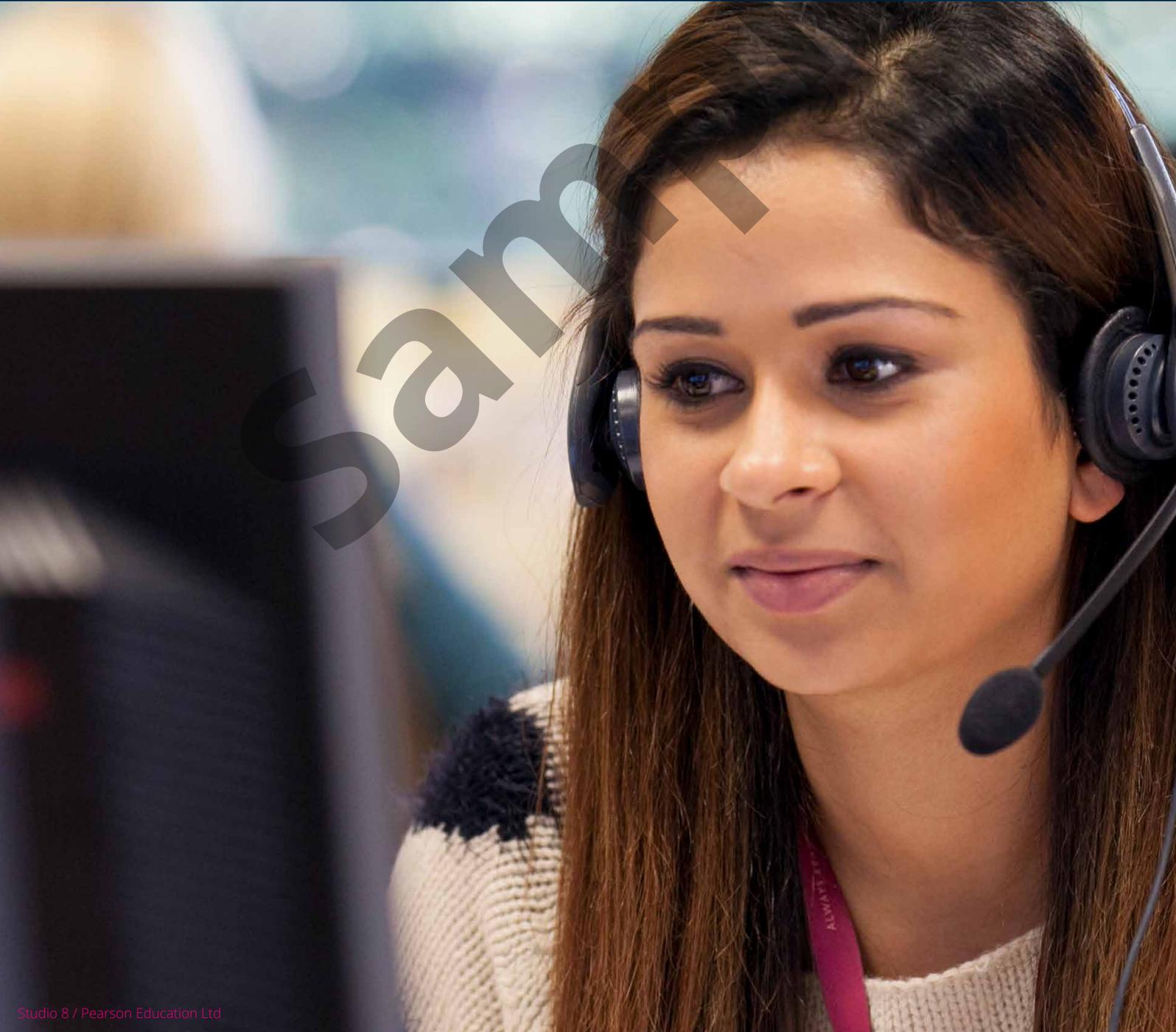
Pearson

Pearson Level 2 End-point Assessment for Customer Service Practitioner

Specification date: October 2017

First assessment date: August 2017

Issue 3



Pearson and Apprenticeships

For new standards and on-programme learning, Pearson as the UK's largest awarding body is able to provide a range of qualifications, including BTECs that are globally recognised and benchmarked. As an approved assessment organisation for end-point assessment for a range of standards, Pearson provides assessment services in line with approved assessment plans. For further information, please visit our website at qualifications.pearson.com. Alternatively, you can get in touch with us using the details on our contact us page at qualifications.pearson.com/contactus

About Pearson

Pearson is the world's leading learning company, with 35,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the learner at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at qualifications.pearson.com

References to third party material made in this specification are made in good faith. Pearson does not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)

All information in this specification is correct at time of publication.

ISBN 978 1 446 95401 0

All the material in this publication is copyright
© Pearson Education Limited 2017

Contents

| | |
|---|-----------|
| End-Point Assessments for the New Apprenticeship Standards | 1 |
| Introduction | 1 |
| 1 The Customer Service Practitioner Apprenticeship | 2 |
| Overview | 2 |
| 2 Customer Service Practitioner End-point Assessment | 4 |
| Structure | 4 |
| Grading | 5 |
| Entry requirements | 6 |
| Language of assessment | 6 |
| Availability of the end-point assessment | 6 |
| Preparing apprentices for the end-point assessment | 6 |
| End-point assessment planning and scheduling | 7 |
| 3 End-point assessment components | 8 |
| 4 Making arrangements for the end-point assessment | 75 |
| Centre recognition | 75 |
| End-point assessment agreement | 75 |
| 5 Administrative arrangements for assessment | 76 |
| Registrations and booking end-point assessments | 76 |
| Reassessment | 77 |
| Overall apprenticeship certification | 77 |
| 6 Access and recruitment | 78 |
| Access arrangements and reasonable adjustments | 78 |
| Safeguarding | 84 |
| 7 Internal quality assurance of the End-Point Assessment | 86 |
| 8 Further information and useful publications | 87 |
| 9 Contact us | 88 |
| Annexe A: Apprentice Showcase Brief | 89 |
| Task 1: Understanding your organisation | 89 |
| Task 2: Understanding your role and responsibilities | 90 |
| Task 3: Reflecting on own practice | 91 |

| | |
|--|------------|
| Annexe B: Identifying potential work-based evidence for the Observation Assessment | 93 |
| Annexe C: Mapping of Practical Observation grade criteria to the Performance requirements | 96 |
| Annexe D: Gateway Declaration Form | 100 |
| Annexe E: Apprentice Showcase Authentication and Certification Declaration form | 101 |

Sample

End-Point Assessments for the New Apprenticeship Standards

Introduction

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 contains the information needed to prepare apprentices for the Level 2 End-point Assessment for Customer Service Practitioner QN 603/2271/8.

The specification signposts you to additional handbooks and policies.

2 Customer Service Practitioner End-point Assessment

Structure

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 |
| 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">• 7 of the 10 (70%) of the Distinction grade criteria within the Apprentice Showcase assessment• 4 of the 5 (80%) of the Distinction criteria within the Practical Observation assessment• 3 of the 4 (75%) of the Distinction criteria within the Professional Discussion assessment. |

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

Component 1: Apprentice Showcase

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 brief, which is in *Annexe A*, 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*, in *Annexe A*, shows how these requirements map to the Pass and Distinction criteria outlined on *pages 34-44*.

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">1 Know the purpose of the business and what 'brand promise' means2 Know your organisation's core values and how they link to the service culture3 Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation. |
| Meeting regulations and legislation | <ol style="list-style-type: none">1 Know the appropriate legislation and regulatory requirements that affect your business2 Know your responsibility in relation to this and how to apply it when delivering service |

Module: Product and service knowledge

Apprenticeship standard outcomes

Content underpinning standard outcomes

1 Understand the products or services that are available from your organisation and keep up to date

Organisational product/service offer: range of products and/or services; new and existing; availability; delivery arrangements; post-transaction services and support.

Features and benefits:

- difference between a feature and benefit of a product or service; examples of features and benefits of products and/or services
- how to use features and benefits of products/services to identify products/services that meet customers' needs; turning features into benefits in customer interactions.

Keeping product/service knowledge up to date:

- importance of keeping knowledge up to date, including providing correct information to customers, identifying best products/services to meet customers' needs, boosts customer confidence and customer satisfaction
- sources of information for keeping up to date, e.g. pre-release product/service information, manufacturer updates and manuals, internet research, product/service specifications, internal or external training, product briefings, process guides.

Module: Influencing skills

Apprenticeship standard outcomes

Content underpinning standard outcomes

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

Customer needs and expectations: dependent on customers' characteristics; examples of expectations include reliable and quick service, professionalism, value for money, respect and fair treatment, helpfulness.

Establishing customer needs and expectations: using appropriate questioning skills to explore customer needs; active listening; reading customers body language; obtaining customer feedback.

Presenting products/services to customers:

- identifying the most appropriate products/services for the customer, based on needs
- giving clear descriptions of product/service features and benefits and how they meet the customer's needs
- demonstrating or explaining use of products/services; helping customers avoid obstacles; providing solutions to customer's issues.
- Using positive verbal and non-verbal communication skills and techniques and demonstrating appropriate behaviours.

Techniques for overcoming barriers and objections: checking customer's understanding; reinforcing product/service features and benefits; making comparisons with alternative products/services to highlight values; showing respect for customer's views; providing evidence, such as customer reviews/testimonials to confirm product/service value; being honest and open in responding to questions; providing reassurance (mirroring technique, agreeing mutual solution to objection).

Assessing performance

Apprentices must produce their evidence for this assessment against the Apprentice Showcase Brief in *Annexe A*

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, as 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 | | Evidence requirements |
| Pass | Distinction | |
| 1A State the aims of the organisation in relation to its sector. | | To meet 1A , apprentices must state whether their organisation is in the public or private sector, the organisation's aim/mission and then show how these relate to each other. |
| 1B State what is meant by the organisation's 'brand promise'. | | To meet 1B , apprentices must state the specific brand promise of their organisation and outline what it tells customers about the value the organisation offers. |
| 1C Explain how the organisation's core values relate to its service culture. | | To meet 1C , apprentices must state their organisation's core values and then explain how these are reflected in the organisation's service culture, i.e. how these values are applied in serving customers. |

| Task 1 (continued) | | |
|---|---|---|
| Grade criteria | | Evidence requirements |
| Pass | Distinction | |
| 1D Explain the difference between the features and benefits of products and/or services in relation to the organisation. | | To meet 1D , apprentices must first give a definition of a product/service 'feature' and a product/service 'benefit'; they must then give examples of product/service features and related benefits using a number of products/services offered by their organisation. |
| 1E Describe the measures and evaluation tools used in the organisation to monitor customer service levels. | | To meet 1E , apprentices must describe a number of the measures and evaluation tools representative of those used by their organisation to monitor customer service levels. The description of each measure must include the type of information it provides. |
| 1F Explain how the relevant legislation and regulations affect the organisation's customer service provision. | 1G Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations. | To meet 1F , apprentices must first outline the main requirements of a minimum of three legislation/regulations that affect their organisation's customer service provision. At least two of these must be consumer-related. They must then explain how each of these affect how they or their have to operate in delivering customer service. To meet 1G , they must explain the potential impact on their organisation if it fails to adhere to each of the three legislation/regulations identified for 1F . |
| | 1H Explain how a code of practice or ethical standards affects customer service. | To meet 1H , apprentices must identify a specific code of practice or ethical standards, outline what it covers and explain how its use affects how customer service is delivered. The named code of practice or ethical standards do not have to be used by their organisation. |

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 on *pages 54–57*.

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 | 1 Depending on your job role and work environment: a Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or b Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions. 2 Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand. |

Annexe D: Gateway Declaration Form

| | | | |
|---|------------|---|--|
| Apprentice Name: | | | |
| ULN: | | | |
| Gateway Date: | | | |
| Pre-requisite Evidence | Y/N | Comments/description of evidence (if applicable) | |
| English and Maths certificates (L1 or above) | | | |
| English and Maths (L2) taken | | | |
| Evidence requirements for the apprentice's organisation Please list any other evidence reviewed as part of the gateway process | | | |
| Employer declaration 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: _____ | | | |
| Apprentice declaration I confirm the gateway evidence is my own and agree to be put forward for the EPA. Signature: _____ Date: _____ | | | |

Sample

October 2017

For information about Edexcel, BTEC or LCCI qualifications visit qualifications.pearson.com

BTEC is a registered trademark of Pearson Education Limited

Pearson Education Limited. Registered in England and Wales No. 872828
Registered Office: 80 Strand, London WC2R 0RL.
VAT Reg No GB 278 537121