

EPA STANDARD SPECIFICATION



**Level 2 Customer Service
Practitioner ST0072
Version 1.0 – January 2024**

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1. Qualification information

1.1 About this standard specification

This End-point Assessment (EPA) specification sets out what is required to achieve the EPA in Customer Service Practitioner. The document contains information regarding the planning and delivery of the EPA process and is intended for use by all parties involved in the process.

EPA is an independent assessment of the knowledge, skills and behaviours (KSBs) that have been learnt throughout an apprenticeship.

This document should be used in conjunction with the published assessment plan on the Institute for Apprenticeships and Technical Education (IfATE) website and the EPA Support Pack provided by Gateway Qualifications for this standard.

Gateway Qualifications is a nationally regulated Awarding Organisation which supports education and training providers through our strong relationships, adaptability and expert team.

Key information	
Standard name	Customer Service Practitioner
Standard reference number	ST072
Assessment plan version	AP02
Level	2
Ofqual QN	610/3724/2
Sector	Sales, Marketing and Procurement
Minimum time on-programme with the provider	366 days
EPA duration	Up to 3 months
EPA methods	<ul style="list-style-type: none"> • Apprentice showcase • Practical observation • Professional discussion
Overall grade	Fail, Pass, Distinction
EQA organisation	Ofqual
Gateway qualification requirements	<ul style="list-style-type: none"> • Level 1 English and Maths. • Taken Level 2 Maths and English

1.2 Purpose

The overall purpose of the EPA is to ensure that the apprentice has met the required level of knowledge, skills and behaviours set by employers and approved by the Institute for Apprenticeships and Technical Education (IFATE).

2. EPA Journey

2.1 On-programme requirements

Full time apprentices will typically spend 12-18 months on-programme (before the EPA Gateway meeting) working towards the occupational standard, with a minimum of 20% off-the-job training.

All apprentices must spend a minimum of 12 months on-programme. In all cases this will be no less than 366 days but may be longer. This will be checked by the provider before the apprentice is submitted for EPA Gateway.

The period of learning, development and formative assessment is managed by the employer, in most cases with the support of the training provider. The on-programme pace

will be driven by individuals as well as by the breadth of experience an employer can offer prior to the minimum of 12 months after which end-point assessment will take place.

Employers should work closely with any training provider to plan and deliver support and training appropriately. This working closely will add value to the employer as it centres on real work competencies demonstrated in a real work environment.

To drive quality and consistency through on-programme learning employers may wish to consider the following:

- Use of their normal performance management processes to monitor the progress of the apprentice, provide feedback and guide development.
- Training providers may support ensuring the requirements of the apprenticeship standard are reflected in the above processes, and by filling any gaps through their work with apprentices.
- Employers and training providers could carry out joint reviews of progress at regular intervals, involving apprentices, line managers and others with a direct relationship, e.g. mentors, workplace coaches, etc. They should agree how any issues are to be resolved together.
- Apprentices may develop and maintain examples of their work throughout their apprenticeship that cover the full standard. This could be in the form of a portfolio or other tracking method to be reviewed on-programme at intervals agreed by the employer and training provider, for example at 3, 6 and 9 months.

2.2 EPA Gateway

The employer, and, if appropriate in conjunction with the provider, will formally sign-off that the apprentice has met the minimum requirements in regard to knowledge, skills and behaviours within the standard and confirm they are ready to move on to the end point assessment.

This will be confirmed at the EPA Gateway Meeting and documented on EPA Pro. This notifies Gateway Qualifications that the apprentice is ready for their EPA and the Planning Meeting needs to be organised.

Before the apprentice can enter the EPA Gateway process, the following evidence is required:

- EPA Gateway Meeting Record
- achievement of English and Maths at Level 1
- record of attempt at English and Maths at Level 2
- Reasonable Adjustments/Special Consideration Request Form where relevant

Apprentices will not be accepted at EPA Gateway if the evidence required is not sufficiently met.

For those with an education, health and care plan or a legacy statement, the apprenticeships English and Maths minimum requirement is Entry Level 3. British Sign Language qualifications are an alternative to English qualifications for whom this is their primary language.

Before the apprentice enters the EPA Gateway, they should be comfortable with the assessments they will complete and ready to demonstrate they can achieve the standard of the apprenticeship.

2.3 EPA Planning Meeting

Gateway Qualifications will schedule the EPA Planning Meeting with the apprentice and the employer. The meeting will take place once the EPA Gateway evidence has been accepted and the apprentice has entered the EPA phase of the apprenticeship.

The purpose of the Planning Meeting is to:

- schedule each assessment activity
- identify the requirements of each assessment method
- facilitate the employer's understanding of the EPA process
- answer any questions or concerns the apprentice may have about the assessment process
- aid in the preparation requirements e.g. arranging access, facilities, and resources
- discuss feedback post EPA
- explain certification upon completion of the apprenticeship
- explain the appeals process

2.4 Assessment overview

The assessment methods for Customer Service Practitioner EPA consist of the following:

1. Apprentice Showcase
2. Practical Observation
3. Professional Discussion

The Practical Observation must take place before the Professional Discussion.

The result of one assessment method does not need to be known before starting the next.

2.5 Assessment method 1 - Apprentice showcase

Assessment Requirements	
Mode of assessment	Apprentice Showcase <ul style="list-style-type: none"> • Interview
Grading	Fail/Pass/Distinction
Assessed by	Independent End-point Assessor (IEPA)
Assessment method weighting	65%

The apprentice showcase is compiled after 12 months of on-programme learning. The Apprentice Showcase enables apprentices to reflect and present examples of their development over the whole on-programme period.

With guidance from the employer and/or training provider the apprentice will select appropriate evidence from the on-programme portfolio to demonstrate the minimum requirements of the standard at the final stage of the programme as an 'Apprentice Showcase'.

This will attest to professional competence at the level. The apprentice showcase will be reviewed and assessed by the IEPA. The evidence contained in the apprentice showcase will be assessed against the following areas of the standard:

- Understanding the organisation
- Meeting regulations and legislation
- Systems and resources
- Product and service knowledge
- Influencing skills
- Personal organisation
- Dealing with customer conflict and challenge
- Developing self
- Being open to feedback
- Team working

The showcase can be evidenced by the apprentice through the delivery of a presentation or by submission of a report, storyboard, journal etc to Gateway Qualifications. The apprentice showcase will be assessed against an externally set brief, written by Gateway Qualifications which will be included in the EPA Support Pack.

It is expected that the externally set brief will include elements such as work-based evidence, including customer feedback, recordings, manager statements, and witness statements. It will also include evidence from others, such as mid-and-end of year performance reviews, and feedback. It is important to acknowledge that the employer and training provider will work together throughout the on-programme learning, ensuring all learning is consistently applied throughout the apprenticeship and not just at EPA or in the apprentice showcase.

The apprentice will then present to the IEPA to provide an opportunity for them to interview the apprentice and delve deeper into the learning and experience. This is to ensure rigor, competence, and independence.

2.6 Assessment method 2 - Practical Observation

Assessment Requirements	
Mode of assessment	Practical observation
Duration	Minimum of 60 minutes – maximum 90 minutes
Grading	Fail/Pass/Distinction
Assessed by	Independent End-point Assessor (IEPA)
Assessment method weighting	20%

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

The practical observation should enable the apprentice to evidence the KSBs from across the standard to demonstrate genuine and demanding work objectives.

Each situation within the observation will be different, and examples are, handling a general enquiry, dealing with a customer complaint or a need for further information or detail, but it is mandatory that the observation covers as a minimum: presentation, equality, interpersonal skills, communication, and personal organisation.

Those areas of the standard that are not able to be evidenced during the observation will be discussed as part of the professional discussion with the IEPA.

2.7 Assessment method 3 - Professional Discussion

Assessment Requirements	
Mode of assessment	Professional discussion <ul style="list-style-type: none"> • sat in a suitable environment
Duration	60 minutes maximum
Grading	Fail/Pass/Distinction
Assessed by	Independent End-point Assessor (IEPA)
Assessment method weighting	15%

The Professional Discussion which takes place after the practical observation, is a structured discussion between the apprentice and the IEPA to establish the apprentice's understanding and application of KSBs.

The purpose of the professional discussion is to:

- clarify any questions the IEPA has from their assessment of the learner journey and practical observation
- confirm and validate judgements about the quality of work
- explore aspects of the work, including how it was carried out, in more detail
- discuss how the apprentice would behave in specific scenarios, should they not have occurred within the practical observation
- ask questions in relation to personal development and reflection
- provide a basis for the IEPA to make a decision about the grade to be awarded

The IEPA will plan the professional discussion in advance and in conjunction with the apprentice and employer at the EPA Planning Meeting.

2.8 Grading requirements

The Customer Service Practitioner apprenticeship standard is graded fail, pass or distinction, with the final grade based on the apprentice's combined performance in each of the assessment methods.

To achieve an overall pass, the apprentice must achieve a pass in each assessment method. To achieve a distinction, the apprentice must achieve the minimum distinction thresholds shown in the table below for each of the three components.

Failure of any component of the EPA will result in an overall failure of the EPA and the apprenticeship.

Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole:

Assessment method	To achieve a Pass	To achieve a Distinction
Assessment method 1 – Apprentice showcase	All of the pass criteria must be met	All pass criteria and 70% (7 of 10) of the distinction criteria must be met
Assessment method 2 – Practical observation	All of the pass criteria must be met	All pass criteria and 80% (4 of 5) of the distinction criteria must be met
Assessment method 3 – Professional discussion	All of the pass criteria must be met	All pass criteria and 75% (3 of 4) of the distinction criteria must be met

3. Results notification and enquiries about results

Gateway Qualifications will send a statement of results notification to the apprentice, employer and provider by email. Results notification will take place once all assessments have been completed. The statement of results will detail the grade for each assessment method and the overall grade of the apprenticeship.

Results are available for employers and providers on EPA Pro.

For a pass/distinction grade, an internal record of achievement is shared with the apprentice and employer. This is not the official apprenticeship certificate.

For a fail grade, the results notification will include details regarding the next steps.

Where an apprentice is not satisfied with the results of their EPA the employer, apprentice or training provider can enquire about the results.

Should an apprentice, employer or provider wish to submit a formal appeal about an assessment decision, please refer to Gateway Qualifications Appeals Policy and procedure.

4. Re-sits and re-takes

Should the apprentice fail any part of the end point assessment further development must be provided prior to a re-take.

When retaking an assessment activity, the maximum grade that can be achieved for that activity is a pass.

Re-assessments are not offered to apprentices wishing to move from pass to distinction.

Any assessment method re-sit or re-take must be taken within three months of the fail notification, otherwise the entire EPA must be taken again, unless in the opinion of Gateway Qualifications exceptional circumstances apply outside the control of the apprentice or their employer.

Re-sits and re-takes are not offered to apprentices wishing to move from pass to distinction.

Where any assessment method must be resat or retaken, the apprentice will be awarded a maximum EPA grade of pass, unless Gateway Qualifications determines there are exceptional circumstances requiring a re-sit or re-take.

5. Access Arrangements, Reasonable Adjustments and Special Considerations

Gateway Qualifications understands its requirement as an Awarding Organisation to make access arrangements and reasonable adjustments for learners with a disability (in accordance with the Equality Act 2010) in order that they are not at a substantial disadvantage in comparison to someone who does not have a disability. Further information is provided in the Gateway Qualifications' [Reasonable Adjustment and Special Consideration Policy](#).

A reasonable adjustment is unique to an individual and should reflect their normal way of working.

Apprentices should be fully involved in any decisions about adjustments/adaptations.

The Gateway Qualifications' [Reasonable Adjustments Form](#) must be completed and submitted to apply for approval. Applications for reasonable adjustments should ideally be submitted to Gateway Qualifications when the learner is registered on EPA Pro but no later than EPA Gateway submission.

Special Considerations

A special consideration is consideration to be given to a learner who has temporarily experienced an illness or injury, or some other event outside of the learner's control, which has had, or is reasonably likely to have materially affected the learner's ability to: (a) take an assessment, or (b) demonstrate his or her level of attainment in an assessment." (From Ofqual, General Conditions of Recognition)

Apprentices and Employers should always aim to reschedule an assessment in the first instance. Applying a special consideration should be a last resort and must not compromise the integrity of an assessment or the reliability and validity of its outcome.

The Gateway Qualifications' [Special Consideration Request Form](#) must be completed and submitted for approval. Requests for special considerations should be submitted no later than ten working days before the assessment or as soon as possible after the assessment but no later than five working days after the assessment.

Appendix 1 – KSBs from the Assessment Plan

Assessment method 1 - Apprentice showcase

Module - Understanding the organisation	
Standard	What the apprentice must know
1. Know the purpose of the business and what 'brand promise' means	1.1 What is the difference between public, private and third sector organisations?
	1.2 What is your organisation business type and purpose?
	1.3 What does 'brand promise' mean?
2. Know your organisation's core values and how they link to the service culture	2.1 What is meant by an organisations core values?
	2.2 What are your organisations core values?
	2.3 What is meant by service culture?
	2.4 What is your organisations service culture?
	2.5 How does your organisations core values link to the service culture?
3. Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation	3.1 What is the purpose of an organisational policy?
	3.2 List the organisational policies and procedures that could affect a customer service role?
	3.3 What should be included in a complaints process/procedure?
	3.4 What is meant by digital media?
	3.5 What digital media policies exist in customer service organisations?

Module - Meeting regulations and legislation

Standard	What the apprentice must know
1. Know the appropriate legislation and regulatory requirements that affect your business	1.1 Identify appropriate legislation and regulation and how this effects your organisation
2. Know your responsibility in relation to this and how to apply it when delivering service	2.1 Why is it important to keep information confidential within an organisation
	2.2 What information needs to be kept and remain confidential within your organisation?
	2.3 What are the responsibilities of the employee under the health and safety at work act?
	2.4 What are the responsibilities of the employer under the health and safety at work act?

Module - Systems and resources

Standard	What the apprentice must know
1. Know how to use systems, equipment and technology to meet the needs of your customers	1.1 What are the systems, equipment and/or technology your organisation uses to effectively meet customer needs?
	1.2 In your role how would you use the systems, equipment and/or technology to support customer needs?
2. Understand types of measurement and evaluation tools available to monitor customer service levels	2.1 What are the types of measurement used to monitor customer service level?
	2.2 What are the types of evaluation tool used to monitor customer service levels?

Module - Product and service knowledge

Standard	What the apprentice must know
1. Understand the products or services that are available from your organisation and keep up-to-date	1.1 What are your organisations products and/or services?
	1.2 What is the difference between providing a product and providing a service.
	1.3 How do you update and maintain your knowledge of your organisations products and/or services?

Module - Influencing skills

Standard	What the apprentice must do
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	1.1 Identify customer needs
	1.2 Offer product and/or service options to customers in a logical and reasoned manner
	1.3 clearly explain how options offered meets the customers' needs.
	1.4 Handle customer objections in a positive and professional manner

Module - Personal organisation

Standard	What the apprentice must do
1. Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines	1.1 Agree goals and deadlines for completing tasks with an appropriate person
	1.2 Prioritise and plan the completion of tasks to meet delivery deadlines
	1.3 Use tools and techniques to monitor progress of tasks
	1.4 Monitor and adjust priorities as required
	1.5 Meet agreed deadlines

Module - Dealing with customer conflict and challenge

Standard	What the apprentice must do
1. Demonstrate patience and calmness.	1.1 Show patience, calmness and empathy when dealing with challenging customer situations
	1.2 Use active listening skills when communicating with customers
	1.3 Use appropriate questioning skills
2. Show you understand the customer's point of view.	2.1 Show understanding of the customer view point
3. Use appropriate sign-posting or resolution to meet your customers' needs and manage expectations.	3.1 Explain the next steps and/or customer options in a logical manner
	3.2 Provide clear sign-posting or resolution to meet customers' needs and manage customer expectations
	3.3 Deal with the customer conflict or challenge presented in line with organisational and/or policies procedure
	3.4 Resolve customer conflict or challenge presented in line with organisational policies and/or procedures
4. Maintain informative communication during service recovery.	4.1 Keep customers informed of progress while resolving issues
	4.2 Maintain accurate record of customer issues and progress to resolution

Module - Developing self

Standard	What the apprentice must show
1. Take ownership for keeping your service knowledge and skills up-to-date.	1.1 Identify own strengths and weaknesses in relation to working within a customer service role
	1.2 Apply the techniques of self- assessment to look at strengths and weaknesses
2. Consider personal goals and propose development that would help achieve them.	2.1 Prepare a personal development plan that helps to achieve personal goals and development needs.
	2.2 Review and update your personal development plan

Module - Being open to feedback

Standard	What the apprentice must show
1. Act on and seek feedback from others to develop or maintain personal service skills and knowledge	1.1 Identify suitable ways of obtaining informal and formal feedback from others
	1.2 Obtain useful and constructive feedback about your own service skills and knowledge from others
	1.3 Positively respond to all feedback
	1.4 Use the feedback received to take responsibility for maintaining and developing your personal customer service skills and knowledge.

Module - Team working

Standard	What the apprentice must show
1. Frequently and consistently communicate and work with others in the interest of helping customers efficiently	1.1 Demonstrate the interpersonal skills required to work effectively as part of a team
	1.2 Communicate consistently with team members in the interest of helping customers
	1.3 Demonstrate cooperation when working with others
2. Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice.	2.1 Share personal learning with others to support good practice
	2.2 Present your ideas and recommendations for improvements in customer service to others

Assessment method 2 – Practical Observation

Module – Interpersonal skills	
Standard	What the apprentice must do
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.	1.1 Demonstrate effective interpersonal skills that achieve positive customer engagement using: <ul style="list-style-type: none"> • Effective use of open and closed questioning skills relevant to the situation • Effective use of active listening skills when communicating • Effective use of body language when interacting with customers • Working with others and sharing good practice when performing your duties
	1.2 Recognise customer needs and expectations
	1.3 Respond to customer needs and manage expectations in a professional and timely manner
	1.4 Build and maintain a rapport with customers

Module – Interpersonal skills

Standard	What the apprentice must do
<p>1. Depending on your job role and work environment</p> <ul style="list-style-type: none"> • Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or • Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non- facing customer interactions • Use an appropriate ‘tone of voice’ in all communications, including written and digital, that reflect the organisation’s brand. 	<p>1.1 Use appropriate methods of verbal and non-verbal communication skills relevant to your work environment</p>
	<p>1.2 Use appropriate body language to maintain or enhance the customer experience</p>
	<p>1.3 Adapt the tone and/or behaviour to maintain or enhance the customer experience as appropriate</p>
	<p>1.4 Confirm yours, and the customers, understanding of the customer’s needs and expectations</p>
	<p>1.5 Use summarising language and/or reinforcement techniques during customer interaction to confirm understanding.</p>
	<p>1.6 Use correct, appropriate and clear communication skills e.g. written and verbal that reflect your organisations brand</p>

Module - Equality – treating all customers as individuals

Standard	What the apprentice must show
1. Treat customers as individuals to provide a personalised customer service experience.	1.1 Treat all customers equally, ensuring that you comply with legal requirements
	1.2 Recognise and respond to individual needs to provide a personalised customer service experience
2. Uphold the organisations core values and service culture through your actions.	2.1 Act in a way that upholds the core values and service culture of the organisation

Module - Presentation – dress code, professional language

Standard	What the apprentice must show
1. Demonstrate professional pride in the job through appropriate dress and positive and confident language.	1.1 Present a tidy and professional image
	1.2 Know and follow organisational dress code
	1.3 Be approachable and welcoming when dealing with customers face to face
	Or
	1.4 Use a welcoming and approachable tone when in non-face to face situations
	1.5 Present a positive attitude with all customers and in various situations
	1.6 Maintain professional and positive language in all situations
	1.7 Be confident and calm in difficult situations

Module - "Right first time"	
Standard	What the apprentice must show
1. Use communication behaviours that establish clearly what each customer requires and manage their expectations.	1.1 Make initial approach to customers in professional manner following organisational procedures
	1.2 Establish customer needs from customer wants
	1.3 Work towards meeting customer needs
	1.4 Adapt tone and behaviour to meet customer needs and expectations
	1.5 Recognise customer expectations
	1.6 Manage customer expectations
	1.7 Check customer satisfaction
	1.8 Remain positive and professional when explaining when customer needs and/or expectations cannot be met.
2. Take ownership from the first contact and then take responsibility for fulfilling your promise.	2.1 Establish initial contact with customers
	2.2 Recognise customer wants, needs and expectations
	2.3 Take responsibility and work with customers to achieve outcome
	2.4 Maintain contact with customers where necessary and as promised (even if no additional information is available)
	2.5 Refer customers to others as required accurately passing on necessary information
	2.6 Follow up as required to ensure outcome is reached
	2.7 Following organisational procedures, check customer satisfaction.

Assessment method 3 - Professional Discussion

Module - Knowing your customers	
Standard	What the apprentice must know
1. Understand who customers are	1.1 Who are my customers?
	1.2 Who are the organisations customers?
	1.3 Describe the different types of customers?
2. Understand the difference between internal and external customers	2.1 What is an internal customer?
	2.2 What is an external customer?
	2.3 Who are the organisations internal customers?
	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	3.1 What is the purpose of customer service?
	3.2 What are the different needs of your customers?
	3.3 What are the different priorities of your customers?
	3.4 Identify the specific needs that customers may have, including those that are protected under current equality law?
	3.5 What is meant by customer expectations?
	3.6 How does the standard of customer service affect the success of your organisation?
	3.7 When do you adapt your service approach to meet the needs and expectations of your customers?
	3.8 How you adapt your service approach to meet the needs and expectations of your customers?

Module - Your role and responsibility

Standard	What the apprentice must know
1. Understand your role and responsibility within your organisation and the impact of your actions on others	1.1 What is your job role and responsibilities within that role?
	1.2 How do your actions impact on others in your organisation?
2. Know the targets and goals you need to deliver against	2.2 Identify the targets and goals for your role.
	2.3 How do you achieve your targets and goals?

Module - Customer experience

Standard	What the apprentice must know
1. Understand how establishing the facts enable you to create a customer focused experience and appropriate response	1.1 What is meant by a customer focused experience?
	1.2 How do you establish the facts to create a customer focused experience?
	1.3 How do you use the facts create an appropriate response
2. Understand how to build trust with a customer and why this is important	2.1 Why is building customer trust important?
	2.2 How would you start to build trust with your customers?

Appendix 2 – Grade descriptors

Assessment method 1 - Apprentice showcase

Pass criteria	Distinction criteria
State the aims of the organisation in relation to its sector.	Explain how the organisational policies and procedures impact on the delivery of customer service.
State what is meant by the organisation's 'brand promise'.	Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations.
Explain how the organisation's core values relate to its service culture.	Explain how a code of practice or ethical standards affects customer service.
State the purpose of different organisational policies and procedures that affect their customer service role.	Explain why it is important to update their knowledge on the organisation's products and/or services.
Describe the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment.	Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached.
Explain how the relevant legislation and regulations affect the organisation's customer service provision.	Respond in a professional manner to challenges and changes and adjust priorities accordingly.
State their responsibilities for keeping information confidential in the organisation.	Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.
State the responsibilities of employees and employers under the Health and Safety at Work Act.	Review the effectiveness of their personal development plan and update it accordingly.
Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively	Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers.
Describe the measures and evaluation tools used in the organisation to monitor customer service levels.	Present reasoned ideas for improving customer service practice to the appropriate colleagues.
Explain the difference between the features and benefits of products and/or services in relation to the organisation.	

Pass criteria	Distinction criteria
Describe how to maintain their knowledge of the organisation's products and/or services.	
Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation.	
Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs.	
Handle customer objections in a positive and professional manner.	
Prioritise and plan the completion of tasks according to agreed deadlines.	
Use appropriate tools and techniques to monitor the progress of tasks completion.	
Maintain calm and patience at all times when dealing with challenging customer situations.	
Demonstrate sensitivity to, and interest in, the customers' concerns.	
Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers.	
Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures.	
Keep customers informed of progress while resolving issues.	
Maintain accurate record of customer issues and progress to resolution.	
Conduct a self-assessment to identify their strengths and weaknesses in relation to the job role.	

Pass criteria	Distinction criteria
Produce a personal development plan to support the achievement of their agreed learning and development goals.	
Seek constructive feedback about their customer service skills and knowledge from others.	
Use feedback from others to develop their customer service skills and knowledge.	
Work with others in a positive and productive manner.	
Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently.	
Share personal learning and information with others to support good customer service practice	

Assessment method 2 - Practical Observation

Pass	Distinction
Demonstrate willingness and ability to engage with customers in a positive manner using relevant interpersonal skills.	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 (verbally or non-verbally).
Work with customers to build a rapport, recognising and where possible meeting their needs and expectations.	Demonstrate ability to balance the needs and expectations of the customer with that of the organisation
Show willingness to work with others and share ideas where appropriate.	Pro-actively work with others to ensure efficient customer service delivery.
'Face to face' . Demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills.	In all roles , 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 in all customer handling.

Pass	Distinction
Adapt tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations.	In all roles, Demonstrate ability to flex to various customer personalities, while remaining calm and in control where necessary. They will also demonstrate they know the organisational procedures to be followed in all communication and the importance to the brand/organisation of this requirement.
Demonstrate ability to recognise when to summarise and the techniques to use.	
'Non- facing'. Demonstrate ability to make initial customer contact and make use of appropriate communication skills.	
Adapts tone and behaviour when necessary, recognising and confirming understanding of needs and expectations.	
Demonstrates ability to recognise and use reinforcement techniques during customer interactions	
Recognise and respond to individual needs to provide a personalised customer service experience.	
Behave in a way that upholds the core values and service culture of the organisation.	
Present a professional image in line with the organisational dress code and code of conduct. OR Demonstrate a positive attitude and welcoming approach consistently when dealing with customers.	
Maintain professional and positive language consistently in customer interactions	
Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging.	

Pass	Distinction
They will show an ability to establish needs and expectations, working towards meeting them where possible, explaining when necessary when they cannot be met	
Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures.	
Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers.	
Take ownership from beginning to end, building and maintaining a relationship with the customer.	
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.	

Assessment method 3 - Professional Discussion

Pass	Distinction
Explain the difference between internal and external customers in the context of their organisation.	Explain the importance of building good customer relationships to the organisation.
Describe the specific needs of different customers, including those protected under current Equality law.	Explain the difference in the way internal and external customer relationships are managed.
Explain when and how to adapt their service approach to meet the needs and expectations of customers.	Explain the importance of balancing the needs of both the organisation and its customers.
Explain when and how to adapt service approach to meet the needs and expectations of customers.	Explain how to respond to customer needs and requirements positively.
Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation.	
Describe how to achieve their agreed targets and goals.	
Explain how an understanding of the facts can be used to create a customer focused experience.	
Explain how to build trust with customers and the importance of doing so.	



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