

# EPA STANDARD SPECIFICATION



**Level 3 Customer Service  
Specialist ST0071  
Version 1.3 – December 2025**

Version and date	Change detail	Section/page reference
<b>V1.0 January 2024</b>	Document created	
<b>V1.1 May 2024</b>	New version of the assessment plan and the application of a temporary dispensation by the Institute for Apprenticeships and Technical Education	<ul style="list-style-type: none"> <li>pg5: standard reference number updated to v1.1, and assessment plan version number updated to ST0071/V1.1</li> </ul> <p>Changes / updates following the release of the new version of the Assessment Plan:</p> <ul style="list-style-type: none"> <li>pg16: practical observation - skills <i>Business focused service delivery: Resolve complex issues by being able to choose from and successfully apply a wide range of approaches.</i> This descriptor has now been moved to the professional discussion</li> <li>pg20: professional discussion - skills - addition of the skills descriptor that was formerly part of the practical observation</li> <li>pg22: practical observation - removal of one of the pass criteria (<i>Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout</i>). This criteria has now been moved to the professional discussion</li> <li>pg28: professional discussion - addition of the pass criteria that was formerly part of the practical observation.</li> </ul>
<b>V1.2 Feb 2025</b>	The evidence required at EPA Gateway has been updated to reflect the changes in the English and Maths requirement	Section 2.2 Page 7
<b>V1.3 Dec 2025</b>	Standard Specification updated to reflect change in SSA in Version 1.3 of the Customer Service Specialist Apprenticeship Standard	Section 1.1 Page 5

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## 1. Qualification information

### 1.1 About this standard specification

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This End-point Assessment (EPA) specification sets out what is required to complete the EPA in Customer Service Specialist. 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 that supports education and training providers through its strong relationships, adaptability and expert team.

Key information	
Standard name	Customer Service Specialist
Standard reference number	ST0071 v1.3
Assessment plan version	ST0071/v1.3
Level	3
Ofqual QN	610/3723/0
Route	Sales, Marketing and Procurement
Sector	15.3 Business Management
Minimum time on-programme with the provider	366 days
EPA duration	Up to 3 months
EPA methods	<ul style="list-style-type: none"> <li>• Practical observation with questions and answers</li> <li>• Work-based project supported by an interview</li> <li>• Professional discussion supported by a portfolio of evidence</li> </ul>
Overall grade	Fail, Pass, Distinction
EQA organisation	Ofqual
Gateway qualification requirements	Level 2 English and Maths

## 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

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Full-time apprentices will typically spend 15 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 support of a training provider. The on-programme pace will be driven by individuals as well as by the breadth of experience an employer can offer, after which end-point assessment will take place.

It is recommended that employers should work closely with any training provider to plan and deliver support and training appropriately. This collaboration will add value to the apprentice as the apprenticeship standard centres on real work competencies demonstrated in real work environment. To drive quality and consistency through on-programme learning it is recommended that employers consider the following:

- Use of their normal performance management processes to monitor the progress of the apprentice, provide feedback and guide development.
- Employers and training providers should 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.
- Use of training providers who will offer on programme support, ensuring the requirements of the apprenticeship standard are reflected in the above processes, and by filling any gaps through their work with apprentices.
- Apprentices must develop and maintain, within a portfolio, examples of their work throughout their apprenticeship. This portfolio will be used by the apprentice to demonstrate to the employer that they are ready for EPA. Some evidence (which has not been assessed by the independent assessor) from this portfolio will be used at a future point to support the professional discussion.

### 2.2 EPA Gateway

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The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say they are deemed to have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's provider, but the decision must ultimately be made solely by the employer.

The employer and provider must confirm that the apprentice is ready to complete the EPA before they can pass through the EPA Gateway, and 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 EPA 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 qualifications, if required, in line with the apprenticeship funding rules
- 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

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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 EPA Planning Meeting is to:

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

## 2.4 Assessment overview

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

1. Practical observation with questions and answers
2. Work-based project supported by an interview
3. Professional discussion supported by a portfolio of evidence

Although there is flexibility in the order in which each assessment method is carried out, it is recommended that the written work-based project takes 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 – Practical observation with questions and answers

Assessment requirements	
<b>Mode of assessment</b>	Practical observation with questions and answers <ul style="list-style-type: none"> <li>• delivered in a controlled environment</li> </ul>
<b>Duration</b>	60 minutes (+10% at the discretion of the IEPA if required)  Questions and answers should not exceed 15% of the total time
<b>Grading</b>	Fail/Pass/Distinction
<b>Assessed by</b>	Independent End-point Assessor (IEPA)
<b>Assessment method weighting</b>	All assessment methods are equally weighted

The IEPA will plan the practical observation with the apprentice and their employer, during the EPA Planning Meeting, taking the workplace environment into consideration. Two weeks' notice of the practical observation must be provided.

The practical observation is covered in one session which must occur in the apprentice's workplace and is carried out face to face. The apprentice must be observed undertaking a range of day-to-day workplace activities. The observation should involve activities that allow the apprentice to demonstrate the required KSBs.

The observation must include questioning by the IEPA to clarify that knowledge and understanding is being applied by the apprentice. Questions must be open questions and IEPAs may ask supplementary questions as required to seek further clarification. Supplementary questions will be devised by the IEPA as required.

During the practical observation the apprentice should have the opportunity, if required, to move from one area/function of the business to another in order to best demonstrate how they have applied their KSBs in a realistic work environment to achieve genuine and demanding work objectives.

The IEPA must plan the practical observation in conjunction with the apprentice and their employer, taking account of workplace considerations. This would typically include timing, the right environment and enough space for the apprentice to be able to do their job.

The practical observation must:

- Reflect typical working conditions.
- Allow the apprentice to demonstrate all aspects of the standard being assessed.
- Take a synoptic approach to assessment the overall competence.
- Be carried out on a one-to-one basis.

The observation can be before or after the work-based project but it is recommended not before the professional discussion.

## 2.6 Assessment method 2 – Work-based project supported by interview

Assessment Requirements	
<b>Mode of assessment</b>	Work-based project supported by an interview
<b>Project word count</b>	2500 words +/-10% excluding annexes
<b>Interview duration</b>	60 minutes (+/-10%)
<b>Number of questions</b>	10
<b>Grading</b>	Fail/Pass/Distinction
<b>Assessed by</b>	Independent End-point Assessor (IEPA)
<b>Assessment method weighting</b>	All assessment methods are equally weighted

The work-based project is designed to ensure the apprentice's learning meets the needs of the business and is relevant to their role.

The apprentice must submit a written report on a project they have carried out to Gateway Qualifications at least two weeks before the interview date. This date will be agreed during the EPA Planning Meeting.

All work on the project will be undertaken following the EPA Gateway Meeting over a two-month period.

The subject of the project report will be agreed with Gateway Qualifications during the EPA Planning Meeting with guidance from the employer to allow them to comment on

appropriateness for their business but, the IEPA will make the final decision to ensure consistency.

The subject of the project report should cover specific high-level challenges (such as a complaint or difficult situation) that the apprentice has dealt with, explaining what it was, what actions (planning and execution) they took, what solutions were offered, details of any recommendations made to change a policy or process and any feedback from the customer. The report should also include details of the apprentice's responsibilities and results of the situation discussed in the report.

The report should also contain annexes that are attributable to the apprentice and the actions they took. Examples of evidence could include emails, letters, meeting notes, call logs, workflow documents or feedback.

Although there is flexibility in the order in which each assessment method is carried out, it is recommended that the written work-based project takes place before the professional discussion.

The employer must ensure the apprentice has sufficient time and the necessary resources to plan and undertake the research and produce the written report.

### **Interview**

The interview must focus on the written project and any supporting annexes.

The IEPA will ask the apprentice ten open-ended, competency-based questions from the interview question bank provided by Gateway Qualifications.

The work-based project and interview will be assessed holistically.

It is best practice, but not mandatory, that an employer representative is present. However, their role is only to observe, and they should not be involved in conducting the interview or grading decisions.

Independent assessors must grade the work-based project and interview holistically

## 2.7 Assessment method 3 – Professional discussion supported by a portfolio of evidence

Assessment Requirements	
<b>Mode of assessment</b>	Professional discussion supported by a portfolio of evidence <ul style="list-style-type: none"> <li>• sat under controlled conditions</li> </ul>
<b>Duration</b>	60 minutes (+/-10%)
<b>Grading</b>	Fail/Pass/Distinction
<b>Assessed by</b>	Independent End-point Assessor (IEPA)
<b>Assessment method weighting</b>	All assessment methods are equally weighted

The IEPA must use open-ended, competency-based questions from the question bank devised by Gateway Qualifications allowing the apprentice the opportunity to cover the grading descriptors required for this assessment.

The professional discussion agenda is not shared with the apprentice or the employer prior to the assessment.

The portfolio of evidence will be produced during the on-programme period of the apprenticeship, and it should showcase the competence of the apprentice, demonstrating how they have learnt, and applied KSBs set out in the apprenticeship standard.

During the professional discussion, evidence from the on-programme portfolio of evidence will be used as a base to support the professional discussion. The apprentice will extract, from their portfolio, evidence which is suitable for supporting them in their professional discussion.

A completed portfolio of evidence must be submitted to Gateway Qualifications two weeks prior to the professional discussion. Gateway Qualifications recommends the provider to submit the apprentice's portfolio of evidence at the EPA Gateway stage. The dates and the method of submission will be agreed during the EPA Planning Meeting.

The portfolio of evidence is not directly assessed. It underpins the professional discussion assessment method and therefore will not be assessed by Gateway Qualifications.

Further requirements for the portfolio of evidence are set out in the EPA Support Pack.

## 2.7 Grading requirements

The Customer Service Specialist 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 a pass overall, the apprentice must achieve a pass in all assessment methods by meeting all the pass descriptors. To achieve a distinction overall, the apprentice must achieve a distinction in all assessment methods by meeting all the distinction descriptors.

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 1 - Practical observation with questions and answers	Assessment method 2 - Work-based project supported by an interview	Assessment method 3 - Professional discussion supported by a portfolio of evidence	Overall grade
A fail grade in any assessment method			Fail
Pass	Pass	Pass	Pass
Pass	Pass	Distinction	Pass
Pass	Distinction	Pass	Pass
Distinction	Pass	Pass	Pass
Pass	Distinction	Distinction	Pass
Distinction	Pass	Distinction	Pass
Distinction	Distinction	Pass	Pass
Distinction	Distinction	Distinction	Distinction

### 3. Results notification and enquiries about results

Gateway Qualifications will send the 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 will be 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

Apprentices who fail one or more assessment methods will be offered the opportunity to re-sit or a re-take and assessment method. A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan in place to prepare for the re-sit or re-take. The apprentice's employer will need to agree that either a re-sit or a re-take is an appropriate course of action.

An apprentice who fails an assessment method, and therefore the EPA in the first instance, will be required to re-sit or re-take any failed assessment method only.

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: Practical observation (with Q&As)

Knowledge	What the apprentice must know
<b>Knowing your customers and their needs / Customer Insight</b>	How to analyse, use and present a range of information to provide customer insight
	Understand different customer types and the role of emotions in bringing about a successful outcome
	Understand how customer expectations can differ between cultures, ages and social profiles
<b>Customer service culture and environment awareness</b>	Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers.

Skills	What the apprentice must know
<b>Business focused service delivery</b>	Find solutions that meet your organisation's needs as well as the customer requirements
<b>Providing a positive customer experience</b>	<p>Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes</p> <p>Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy</p> <p>Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps</p> <p>Identify where highs and lows of the customer journey produce a range of emotions in the customer</p> <p>Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format</p>
<b>Customer service performance</b>	<p>Maintain a positive relationship even when you are unable to deliver the customer's expected outcome</p> <p>When managing referrals or escalations take into account historical interactions and challenges to determine next steps.</p>

Behaviours	What the apprentice must know
<b>Ownership / Responsibility</b>	Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation
	Exercises proactivity and creativity when identifying solutions to customer and organisational issues
<b>Team working</b>	Work effectively and collaboratively with colleagues at all levels to achieve results
	Recognise colleagues as internal customers
<b>Equality</b>	Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer
	Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment
<b>Presentation</b>	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction
	Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand

## Assessment method 2: Work based project (supported by an interview)

Knowledge	What the apprentice must know
<b>Business Knowledge and Understanding</b>	Understand your organisation's current business strategy in relation to customers and make recommendation for its future.
	Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation
	Understand the principles and benefits of being able to think about the future when taking action or making service related decisions
<b>Customer Journey knowledge</b>	Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience.
	Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation.
<b>Customer service culture and environment awareness</b>	Understand your business environment and culture and the position of customer service within it
	Understand your organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong

Skills	What the apprentice must know
<b>Business focused service delivery</b>	Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice
<b>Providing a positive customer experience</b>	Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction
<b>Working with your customers / customer insights</b>	Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it
	Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service
<b>Service improvement</b>	Analyse the end to end service experience, seeking input from others where required supporting development of solutions
	Make recommendations based on your findings to enable improvement
	Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice

### Assessment method 3: Professional discussion (supported by portfolio evidence)

Knowledge	What the apprentice must know
<b>Business Knowledge and Understanding</b>	Understand the impact your service provision has on the wider organisation and the value it adds
	Understand a range of leadership styles and apply them successfully in a customer service environment
<b>Customer Journey knowledge</b>	Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention
	Understand commercial factors and authority limits for delivering the required customer experience
<b>Knowing your customers and their needs/Customer Insight</b>	Know your internal and external customers and how their behaviour may require different approaches from you
	Understand what drives loyalty, retention and satisfaction and how they impact on your organisation
<b>Customer service culture and environment awareness</b>	Understand how to find and use industry best practice to enhance own knowledge

Skills	What the apprentice must know
<b>Business focused service delivery</b>	Resolve complex issues by being able to choose from and successfully apply a wide range of approaches
<b>Providing a positive customer experience</b>	Demonstrate a cost-conscious mind-set when meeting customer and the business needs

Behaviours	What the apprentice must know
<b>Develop self</b>	Proactively keep your service, industry and best practice knowledge and skills up-to-date
	Consider personal goals related to service and take action towards achieving them
<b>Ownership / Responsibility</b>	Make realistic promises and deliver on them
<b>Team working</b>	Share knowledge and experience with others to support colleague development

## Appendix 2 Grade descriptors

### Assessment method 1: Practical observation (with Q&As)

Fail	Pass	Distinction
<b>Fail Criteria:</b> the apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria:	<b>Pass Criteria:</b> the apprentice must display all the following:	<b>Distinction Criteria:</b> the apprentice must display all the pass criteria and all the following:
Shows a little or no understanding of their role in meeting the organisation's customer service standard.	An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.	Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.
Does not fully know or understand their organisation's service level agreement.	Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.	Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.
Provides insufficient evidence to demonstrate an understanding of customer expectations.	Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction.	
	An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.	
	Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.	
	Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.	
	Recognises when customer emotions have been affected by the level of service offered.	

Fail	Pass	Distinction
	Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.	
	Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.	
	Evidences when they have maintained a positive relationship even when they are unable to deliver the customer's expected outcome.	
	Evidences how they recognise when customer expectations are not met and demonstrates how, using appropriate communication techniques, this could be managed to maintain a positive relationship.	
	Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.	
	Shows proactivity and creativity when identifying solutions to customer and organisational issues.	
	Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures.	
	Demonstrates achievement of results through effective team work and collaboration with colleagues at all levels.	
	Shows adaptability of own skills when working with internal customers.	
	Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.	
	Evidence to show how their personal presentation made a positive impact on their organisation's brand.	
	Demonstrate brand advocacy, values and belief when dealing with customer	

Fail	Pass	Distinction
	requests to build trust, credibility and satisfaction.	
	Demonstrates how they analyse, use and present a range of information in order to provide customer insight.	

## Assessment method 2: Work-based project (supported by interview)

Fail	Pass	Distinction
<b>Fail Criteria:</b> the apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria:	<b>Pass Criteria:</b> the apprentice must display all the following:	<b>Distinction Criteria:</b> the apprentice must display all the pass criteria and all the following:
Fails to recommend improvements in customer service provision.	Evidence that they understand the impact of the organisation's mission statement and business strategy on customer service delivery and make recommendations for future improvements.	Evidence to support their research and analysis of customer service standards and mission statements of other organisations, in comparison to their own organisations, to inform their recommendations.
Does not demonstrate an understanding of customer journeys.	Ability to recommend improvement to the customer service provision, the steps required to implement this change and the benefit this change could have on the organisation and their own role.	
Shows limited ability in understanding customer journeys to ensure successful outcomes.	Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.	
	An understanding of the underpinning business processes that support them on bringing about the best outcome for customers and their organisation.	
	Provides evidence to show how they identify information which can be used by their organisation to provide customer insight and identify how this information can be analysed, used and presented.	
	Ability to discuss the internal and external factors influencing their business environment and culture.	
	Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery.	

Fail	Pass	Distinction
	Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.	
	Ability to identify potential causes of service failure and the consequences of these.	
	Evidences when they made decisions and recommendations to improve their own customer service delivery.	
	Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.	
	Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements.	
	Ability to gather and analyse information about the types of customers their organisation has and explain how the service they provide meets their potential needs and expectations.	
	Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.	
	Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required.	
	Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.	

### Assessment method 3: Professional Discussion (supported by portfolio evidence)

Fail	Pass	Distinction
<b>Fail Criteria:</b> the apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria:	<b>Pass Criteria:</b> the apprentice must display all the following:	<b>Distinction Criteria:</b> the apprentice must display all the pass criteria and all the following:
Does not understand the content and importance of the organisation's service level agreement.	Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments.	Evidences when they have assessed the impact of sharing their own knowledge on: a. their development b. colleague development
Demonstrates limited knowledge and understanding of whom the internal and external customers are and their expectations.	Evidence of how they identify the different types of leadership styles that work best in their customer environment.	Evidences when they have analysed the importance of their professional image and its relationship with the organisation's brand.
Provides no knowledge and understanding of leadership styles.	Demonstrates when they have balanced the meeting of their customer and their organisation's needs while showing they have considered cost implications.	Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach.
Gives ineffective evidence of personal learning and development goals and shows no understanding of how they can be achieved.	Demonstrate sharing own knowledge and experience with others, to support colleague development.	
	Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.	
	Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.	
	Evidences knowledge of how their internal and external customers' expectations can differ and how they	

Fail	Pass	Distinction
	would adapt their approach to meet those expectations.	
	Demonstrates responsibility and ownership in resolving customer issues, by getting the right people involved and delivering on promises, to the satisfaction of the customer and their organisation.	
	Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.	
	Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.	
	Evidences knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development.	
	Provides evidence to demonstrate how they have achieved learning and development goals, identified in an agreed personal development plan, in relation to their knowledge and skills of customer service, in the industry and best practice.	



[epa@gatewayqualifications.org.uk](mailto:epa@gatewayqualifications.org.uk)  
[www.gatewayqualifications.org.uk](http://www.gatewayqualifications.org.uk)  
Tel: 01206 911 211

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