



Customer Service Specialist

[Level 3]



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FORWARD TOGETHER

Overview

Level 3 Customer Service Specialist

The Customer Service Specialist apprenticeship trains apprentices to function as a professional for direct customer support within a range of sectors and organisations.

This apprenticeship is ideal for staff who work in customer facing or advisory roles and have the scope and ability to influence change and improvements in service.

Apprentices in this role are advocates of your organisation's service standards and work with your customers every day dealing with complex queries and problems, as well as technical requests. The apprentice is likely to be an expert in the organisation's products and services and support and share knowledge with the wider team.

Employer benefits

Provide excellent internal and external customer service

Referral point for dealing with more complex and technical customer requests

Provide expert guidance and support to stakeholders

Gathers and analyses data with the ability to influence change

Advocate for excellent customer service

Deal with complex customer conflict and challenge

Expert in the organisation's products and services

Who is it for?

This Customer Service Specialist apprenticeship is suitable for individuals who provide a service which involves communication with internal and external customers. Their duties may vary but it is for people who deal with customers in a positive, reliable, and pleasant way, offering advice, answering questions or handling complaints. They will be an expert in their field and have the scope and ability to influence change and improvement to services.

Typical roles include

- Customer Relations Manager
- Senior Customer Service Advisor
- Customer Service Manager
- Coordinator
- Team Leader
- Call Centre Leader



Why Do This Apprenticeship

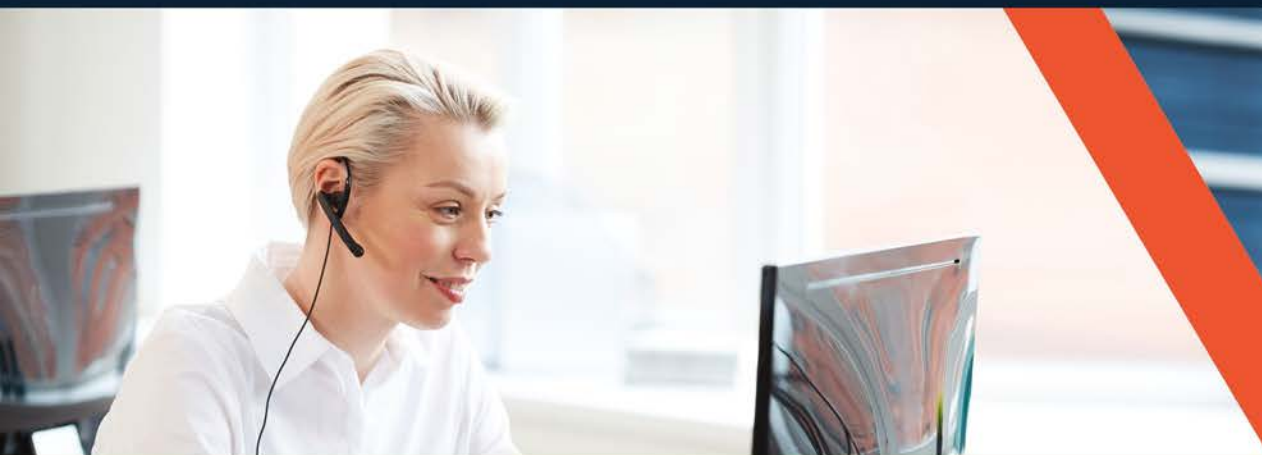
What Are The Benefits:

Employer Benefits

- ✓ Development of workplace problem solving skills
- ✓ Apprentices develop the critical skills demanded by employers
- ✓ Brings latest knowledge and practice into your business
- ✓ Enhances reputation, provides customer reassurance by investing in trained staff
- ✓ Develop effective and confident staff with the ability to communicate and collaborate with colleagues
- ✓ Staff are confident and can recommend and implement improvements to services
- ✓ Maximises staff efficiency and productivity through the development of knowledge and increasing team motivation by developing a learning culture
- ✓ Staff champion excellent customer service and provide a better understanding around customer challenges and how to recognise and resolve
- ✓ Staff that provide a service in line with your organisation's standards and with appropriate regulatory requirements

Learner Benefits

- ✓ As a customer service expert your actions have the direct ability to influence the customer experience and satisfaction of your organisation
- ✓ Develop a thorough knowledge of the products and services within your organisation
- ✓ Develop and demonstrate a range of transferable skills and professional behaviours and attributes in the work environment
- ✓ Develops understanding around how to approach self-development
- ✓ Provides the confidence and skills, knowledge and behaviours to recommend and implement improvements to products and services
- ✓ Enables a better understanding around customer challenge and how to recognise and resolve
- ✓ Develops further understanding of your organisation and wider business environment
- ✓ Applies learnt theories and models to practical situations within the workplace
- ✓ Gain relevant skills from an industry driven approach



Typical Programme Structure

The course is delivered via a mix of face to face and online workshops, webinars, coaching sessions and workplace learning

Typical Programme Breakdown

- 10 x 5-hour workshops to cover knowledge elements of the standard and diploma (may include face to face and online workshop delivery)
- 4 x skills development workshops and workplace visits
- 8 x 1 1/2 hr reviews and coaching sessions (virtual)
- 2 x 5-hour EPA preparation and mock assessment workshops
- Development of a Portfolio of Evidence and assignment completion
- Completion and achievement of the Level 3 Diploma in Customer Service (Optional)
- Completion of work-based project
- Completion of online learning modules as part of the off-the-job activities

Programme Length

Course duration 15-18 months plus EPA

How is training delivered

An essential element of the ESP delivery model is to ensure you are supported at each stage in your journey to enable you to fully succeed.

Learners will be taught and supported by Learning Skills Coaches who are experts in their field, with significant practical experience.



Our Learning Skills Coaches will:

Deliver online and face to face workshops

Cover the knowledge needed for each module through interactive and informative sessions

Help plan independent learning activities

Provide one to one coaching via telephone, in the workplace or via virtual mediums like Teams

Provide feedback on written assignments and evidence submitted

Support you with preparation for End Point Assessment

Duties / Programme modules

The delivery is broken down into 10 topics

01

Business knowledge & understanding

Apprentices understand what continuous improvement means, understand the business strategy in relation to customers and make recommendations for the future

02

Customer journey knowledge

Apprentices understand and critically evaluate the possible journeys of customers, including challenges and the end-to-end experience. They understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention

03

Knowing your customers and their needs / customer insight

Apprentices know their internal and external customers and how their behaviour may require different approaches. They understand how customer expectations can differ between cultures, ages and social profiles. Understand different customer types and the role of emotions in bringing about a successful outcome

04

Customer service culture and environment awareness

Apprentices keep current. Knowledge and understanding of regulatory considerations, drivers and impacts in relation to how they deliver for customers. They understand their business environment / culture and the position of customer service within it. They understand how to find and use industry best practice to enhance their own knowledge

05

Developing self

Apprentices take ownership for keeping your knowledge and skills up to date. Consider personal goals and development that would help you to achieve them

06

Business focused delivery

Apprentices demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice. Resolve complex issues. Find solutions that meet the needs of your customer and, our organisation

07

Providing a positive customer experience

Apprentices explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction. Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format

08

Customer insights

Apprentices proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it. They analyse their customer types, to identify or anticipate their potential needs and expectations when providing a service

09

Customer service performance

Apprentices maintain a positive relationship even when they are unable to deliver the customer's expected outcome. When managing referrals or escalations they take into account historical interactions and challenges to determine next steps

10

Service improvement

Apprentices analyse the end-to-end service experience, seeking input from others where required, supporting development of solutions. Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations, and industry best practice and to enable improvement

Programme Summary

Knowledge

- Organise and deliver customer service
- Understand the customer service environment
- Resolve customer problems
- Principles of business
- Understanding of customers and customer retention
- Manage personal and professional development
- Gather, analyse and interpret customer feedback
- Monitor the quality of customer service interactions
- Build and maintain effective customer relations
- Obtaining and analysing sales related information
- Negotiate in a business environment

Skills

- Problem solving
- Building relationships
- Negotiation
- Data analysis
- Organisational
- Effective communication

Behaviours

- Taking responsibility, demonstrating resilience and accountability
- Flexible to organisation's needs, adaptable to feedback and change
- Professionalism and operating within organisational values

As part of the Customer Service Specialist standard you are able to complete a diploma. We are offering the BTEC diploma alongside the Level 3 Customer Service Specialist Apprenticeship. This will be delivered as part of the workshop delivery during the course of the apprenticeship programme

Diploma details

Title: Level 3 Diploma in Customer Service

Credits: 55 and 12 Units

All credits/units must be completed to achieve the qualification. The Level 3 diploma must be completed and achieved prior to end point assessment

Pre-Enrolment Activities

Before being accepted on to the apprenticeship you will need to complete the following pre-enrolment activities:

IAG Workshop

Attend a virtual workshop session to provide an overview of the following

- Overview of the apprenticeship programme
- 20% Off-the-Job Training
- Attendance at masterclasses and workshops
- Discuss apprenticeship agreement

Initial Assessment

Complete BKSBS Maths and English initial assessments

Diagnostic Assessment

Complete BKSBS Maths and English diagnostic assessments

Pre-Start Enrolment Form

This form will provide us with basic information about your qualifications and past and current experience

Skills Scan

Complete skills scan to identify the areas that will be covered during the course to determine whether there are development opportunities and scope for the learner to complete the apprenticeship

Remote Pre-enrolment Review

Attend 1 :1 remote session with the Learning and Skills Coach to talk through the pre-enrolment activities and skills scan to confirm suitability

Enrolment form (online)

Complete formal online enrolment form

Apprentice Agreement and Commitment Statement (online):

Read, discuss and agree the apprentice agreement and commitment statement

Formal on-boarding

Apprentice invited to induction introduction to the apprenticeship programme and first learning session

Expectations and Commitment

We ask apprentices to:

Attend all face to face, virtual workshops, and master classes as per the delivery plan

Attend all programme reviews with the Learning Skills Coach

Submit and upload assignments and evidence to the online e-portfolio (OneFile) by the stipulated target date to ensure completion of and qualification of the apprenticeship within the given timeframe

Complete all off-the-job activities to meet the 20% off-the-job requirement. Record all activities and reflections on OneFile

Complete at least 4 to 6 hours of self-study each week inclusive of any online learning activities

Complete shadowing of colleagues and mentoring

Eligibility

The eligibility criteria are as follows:

- Not currently a student in funded learning
- Apprentices will need GCSE grade A to C or a Level 2 Functional Skill in Maths and English. Apprentices who do not currently hold this are required to complete Level 2 Functional Skills in Maths and English prior to end point assessment (EPA)

End Point Assessment

The End Point Assessment will begin once the employer, apprentice and ESP are confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard. As part of this process apprentices, employers and ESP will complete a 'Gateway' discussion to confirm competence.

The End Point Assessment consists of the following:

Practical observation with Q&As

Observation will last 60 minutes (+/- 10%)
The observation should take place in the apprentice's normal place of work
The apprentice will be observed by an independent assessor
The End Point Assessor will question the apprentice to clarify their knowledge and understanding is being applied correctly throughout the observation
The End Point Assessors can ask supplementary questions as required to seek further clarification. The amount of questioning time conducted during the observation should not exceed 9 minutes

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 the assessment of the overall competence
- Be conducted on a one-to-one basis

Work-based project supported by an interview

Agree project proposal with employer and produce a 200-to-300-word proposal
The End Point Assessor will review the proposal of the project at the Gateway meeting
The apprentice should only start to write their project report once the proposal has been approved by the End Point Assessor
The project must be started after the Gateway process and must be completed within a 2-month period
Produce a 2500-word report of a high-level challenge that the apprentice has experienced (such as a complaint or difficult situation) which should cover the following areas:

- An explanation of what the situation was
- What actions the apprentice took
- What solutions were offered
- Details of any recommendations made to change a policy or process
- Any feedback from the customer
- What the apprentice's responsibilities were
- What the results were

End Point Assessors will only mark projects up to 2500 words +/- 10% (Maximum 2750 words)
The project should be submitted at least two weeks before the date of interview
The work-based project will form the basis of the interview and will last 60 minutes (+/- 10%)
The apprentice will be asked 10 competency-based questions

Professional discussion supported by Portfolio of Evidence

The professional will be conducted for a minimum of 60 minutes (+/- 10%)
The professional discussion will be a structured discussion between the apprentice and the independent assessor. It aims to establish the apprentice's understanding and application of knowledge, skills and behaviours
During the professional discussion, the apprentice should extract/discuss information from their on-programme Portfolio of Evidence
Portfolio of Evidence should consist of a minimum of 10 pieces of evidence and maximum of 15 pieces of evidence
The Portfolio of Evidence could include things such as witness statements, customers emails or letters, and manager feedback from one-to-ones or similar



On programme learning

Minimum 15 months



Gateway

Planning / Meeting

30-minute remote
Video or telephonic conference
PC/Laptop Wi-Fi connection, with
apprentice, training provider,
employer and End Point Assessor



Observation with Q&As

1-hour face-to-face
Apprentice's workplace,
EPA access
to workplace, Apprentice,
End Point Assessor



Professional Discussion

1-hour estimated. Face to face / remote
Anywhere suitable, exam conditions,
PC/Laptop Wi-Fi connection, with
apprentice and End Point Assessor



Grading and determination

Grading Fail/Pass/Distinction



ESFA certification



Project interview

1-hour estimated
Anywhere suitable, exam conditions,
PC/Laptop Wi-Fi connection, with apprentice
and End Point Assessor, Employer/Mentor



Forward Together

Progression Opportunities

- ✓ Qualifications and further-study
- ✓ Further progression through work experience
- ✓ Upon completing this apprenticeship, learners are eligible to join the Institute of Customer Service, and may choose to do
 - Team Leading Level 3
 - Project Management Level 4
 - Operations / Departmental Manager Level 5

