

Open Awards Level 3 End-point Assessment for

ST0071 Customer Service Specialist

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Version History

Version	Date	Change(s) made	Section(s)	Publication source(s)
1	September 24	New document.	All	Development Team

This EPA Handbook is for apprentices, employers and providers. It provides an overview of the end-point assessment, the assessment methods, the grading criteria etc. It is a reference document which will guide you through each stage of the process.

For further information about apprenticeship standards and Trailblazers please contact enquiries@openawards.org.uk

Occupational Overview

The main purpose of a customer service specialist is to be a 'professional' for direct customer support within all sectors and organisation types. You are an advocate of Customer Service who acts as a referral point for dealing with more complex or technical customer requests, complaints, and queries. You are often an escalation point for complicated or ongoing customer problems.

As an expert in your organisation's products and/or services, you share knowledge with your wider team and colleagues. You gather and analyse data and customer information that influences change and improvements in service. Utilising both organisational and generic IT systems to carry out your role with an awareness of other digital technologies. This could be in many types of environments including contact centres, retail, webchat, service industry or any customer service point.

Further details on the knowledge, skills and behaviours associated within the occupational standard are accessible on the IfATE website¹ and in the Assessment Specification section in this document.

Standard Information

Level: 3

Reference: ST0071

Approved for delivery: 2018

Route: Sales, marketing and procurement

Minimum duration to gateway: 12 months (this does not include the EPA period)

Employers involved in creating the standard: Boots UK, Centrica, Institute of Customer Service, Accelerator Solutions, bpi.recycled products, BT, Eon Energy, Osbourne Property Services, Capita, Northern Power Grid

External Quality Assurance Provider: Ofqual

Entry Requirements

Apprentices will be required to have or achieve level 2 English and Maths prior to completion of their Apprenticeship.

¹ <https://www.instituteforapprenticeships.org/apprenticeship-standards/>

End-point Assessment Documents Overview

An overview of the main documents and supporting materials you will encounter during this end-point assessment is in the table below.

Document Name	Brief Description	Who Should Read this Document	When To Use this Document	Additional Information
Skills Scan	This document is designed to support employers and providers to ensure that an apprentice's job role meets the requirements of the standard.	Employers Providers	Use this during the decision making process when considering whether the EPA is appropriate for the apprentice.	This allows employers and providers to ensure that the EPA is a good fit for the skills and aspirations of the apprentice.
Apprentice EPA Journey	A one page visual overview of the different milestones the apprentice will reach within their EPA journey.	Apprentices Employers Providers	Before committing to the course to make sure it is the right fit for you. Throughout the EPA journey.	This roadmap will help you to understand what has been achieved so far and what still needs to be completed.
EPA Handbook	This provides an overview of the end-point assessment, the assessment methods, the grading criteria etc. It is a reference document which will guide you through each stage of the process.	Apprentices Employers Providers	During the apprenticeship as a reminder of the expectations, assessment methods and grading.	This is a key document which will help you to navigate your way through each step of the end-point assessment. Refer back to this frequently.

Document Name	Brief Description	Who Should Read this Document	When To Use this Document	Additional Information
Progression Tracker	This allows the employer to compile and record an evidence base to prove that the apprentice has demonstrated competence against each KSB specified in the assessment plan.	Apprentices Employers Providers	Throughout the EPA prior to gateway.	This document could be a valuable basis for discussions around progress that the employer may have with the apprentice.
Preparation for the Work Based Project	This gives you a brief reminder of how to prepare for the Work Based Project and the KSBs that will be assessed through this assessment method.	Apprentices Employers Providers	When preparing for your Work Based Project.	The grading descriptors will help apprentices to identify areas you may need to work on.
Preparation for the Practical Observation	This gives you a brief reminder of how to prepare for the Observation of Practice and the KSBs that will be assessed through this assessment method.	Apprentices Employers Providers	When preparing for your Practical Observation.	The grading descriptors will help apprentices to identify areas you may need to work on.
Preparation for the Professional Discussion	This gives you a brief reminder of how to prepare for the Professional Discussion and the knowledge and behaviours	Apprentices Employers Providers	When preparing for your Professional Discussion.	The grading descriptors may help you to complete a self-assessment whilst preparing for the

Document Name	Brief Description	Who Should Read this Document	When To Use this Document	Additional Information
	that will be assessed			Professional Discussion
Gateway Authenticity and Declaration form	This form declares that the apprentice is ready for gateway, the gateway conditions have been met and the evidence submitted has been produced by the apprentice.	Apprentices Employers Providers	At gateway.	This form needs to be signed by employers, providers and the apprentice. The apprentice is unable to enter gateway until this form has been completed and submitted.

Gateway Requirements

The training provider must provide Open Awards with the following evidence to enable us to approve the gateway.

- Apprentices must have completed the minimum apprenticeship on-programme duration (12 months from the start date).
- Level 2 English and mathematics. For those apprentices with an education, health and care plan or a legacy statement the apprenticeships English and mathematics minimum requirement is Entry Level 3 and British Sign Language qualifications are an alternative to English qualifications for whom this is their primary language.
- Portfolio of evidence consisting of 10 to 15 pieces of evidence mapped to the portfolio of evidence referencing matrix.
- Work based project brief.
- Fully completed and signed Gateway Authenticity Declaration form.

For more information on acceptable qualifications for English and mathematics, please visit [here](#).

Assessment

The ST0071 EPA consists of three (3) assessment methods:

- Practical Observation (with Q&A)
- Work Based Project (supported by an interview)
- Professional Discussion (supported by portfolio evidence)

Assessment Preparation

Support materials are available on the Open Awards portal to help prepare apprentices for their assessments. These materials will also support training providers and employers post-gateway to ensure apprentices are well prepared for their EPA experience. They are not intended to be used to measure proficiency pre-gateway or to support gateway decisions. Training providers can access these materials through the Secure Portal.

Order of Assessments

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.

Assessment Window

All assessments must be completed within a period of three (3) months from Open Awards approving the gateway.

Practical Observation (with Q&A)

The apprentice must be observed, by an independent assessor, undertaking a range of day-to-day workplace activities. The observation should involve activities which allow the apprentice to demonstrate the full range of their knowledge, skills and behaviours required.

Delivery

The observation must include questioning to clarify knowledge and understanding is being applied. Standardised questions must be devised by the EPAOs to explore the apprentice's knowledge, skills and behaviour. Questions must be open questions and independent assessors may ask supplementary questions as required to seek further clarification. The independent assessor must only conduct one apprentice practical observation at a time to ensure quality and rigour and they must be as unobtrusive as possible. The practical observation must take place in the apprentice's workplace.

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 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.

Independent assessors will manage invigilation of apprentices at all times, including moving between locations.

The independent assessor will explain to the apprentice the format and timescales of the observation before it begins. This does not count towards the assessment time.

Assessment Timings

The practical observation will last for 1 hour, +/- 10%. The amount of questioning time carried out during the observation should not exceed 15% of the total time allowed for the practical observation. This time is to allow the apprentice to respond to the questions and add clarity.

Pass and Distinction grading descriptors for the practical observation are in the following table.

Practical Observation (with Q&A) - Grading Descriptors

Pass Grading Descriptors	
P1	An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.
P2	Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.
P3	Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction.
P4	An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.
P5	Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.
P6	Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.
P7	Recognises when customer emotions have been affected by the level of service offered.
P8	Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.
P9	Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.

Pass Grading Descriptors	
P10	Evidences when they have maintained a positive relationship even when they are unable to deliver the customer's expected outcome.
P11	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.
P12	Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.
P13	Shows proactivity and creativity when identifying solutions to customer and organisational issues.
P14	Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures.
P15	Demonstrates achievement of results through effective team work and collaboration with colleagues at all levels.
P16	Shows adaptability of own skills when working with internal customers.
P17	Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.
P18	Evidence to show how their personal presentation made a positive impact on their organisation's brand.
P19	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.
P20	Demonstrates how they analyse, use and present a range of information in order to provide customer insight.
Distinction Grading Descriptors	
D1	Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.
D2	Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.

To achieve a pass, apprentices must meet **all** of the pass grading descriptors.

To achieve a distinction, apprentices must meet **all** of the pass and **all** of the distinction grading descriptors.

A fail grade would be given where an apprentice does **not** meet all of the pass grading descriptors.

Practical Observation (with Q&A) - Knowledge, Skills and Behaviours

Ref	Criteria
Knowledge	
K11	Understand how to analyse, use and present a range of information to provide customer insight
K13	Understand different customer types and the role of emotions in bringing about a successful outcome
K14	Understand how customer expectations can differ between cultures, ages and social profiles

K15	Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers
Skills	
S3	Find solutions that meet your organisations needs as well as the customer requirements
S4	Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes
S5	Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy
S6	Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps
S9	Identifying where highs and lows of the customer journey produce a range of emotions in the customer
S10	Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format
S13	Maintain a positive relationship even when you are unable to deliver the customer's expected outcome
S14	When managing referrals or escalations take into account historical interactions and challenges to determine next steps
Behaviours	
B3	Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation
B4	Exercises proactivity and creativity when identifying solutions to customer and organisational issues
B6	Work effectively and collaboratively with colleagues at all levels to achieve results
B7	Recognise colleagues as internal customers
B9	Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer
B10	Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment
B11	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction
B12	Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand

Work Based Project (supported by an interview)

In the work based project, the apprentice must submit their work based project brief at gateway. This must be approved by the employer and will then be reviewed by the IEPA. The IEPA will confirm that the work based project allows the apprentice the scope and depth to achieve the grading descriptors.

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 subject should cover a specific high-level challenge (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. Details should also include the apprentice's responsibilities and results.

Delivery

The written report for the work based project must be started after the apprentice has successfully achieved gateway. The written report must be 2500 words (+/- 10%), excluding annexes. The written report must be submitted to the IEPA within 2 months of achieving gateway. The written report must also be submitted to the IEPA 2 weeks before the interview date.

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

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

The apprentice will then complete an interview with the IEPA to further support their written report. A representative from the employer may be present during the interview but they are only able to observe and must not be involved in conducting the interview or the grading decision.

The apprentice will be asked 10 competency-based questions during the interview by the IEPA. These will be taken from the question bank. The interview will take place either face-to-face or via online video conference technology.

Assessment Timings

The interview will last 60 minutes (+/- 10%) and will take place 2 weeks after the written report has been submitted. This is to allow adequate time for the IEPA to review the written report and prepare questions for the interview.

Pass and Distinction grading descriptors for the work based project are in the following table.

Work Based Project - Grading Descriptors

Pass Grading Descriptors	
P1	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.
P2	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.
P3	Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.
P4	An understanding of the underpinning business processes that support them on bringing about the best outcome for customers and their organisation.

Pass Grading Descriptors	
P5	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.
P6	Ability to discuss the internal and external factors influencing their business environment and culture.
P7	Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery.
P8	Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.
P9	Ability to identify potential causes of service failure and the consequences of these.
P10	Evidences when they made decisions and recommendations to improve their own customer service delivery.
P11	Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.
P12	Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements.
P13	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.
P14	Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.
P15	Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required.
P16	Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.
Distinction Grading Descriptors	
D1	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.
D2	Ability to consider the possible impact on their organisation of not considering the future in decision-making.
D3	Demonstrates how knowing their customer and their needs has a direct impact on: a. their working practices b. organisational policy / procedures
D4	Ability to demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation.
D5	Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s).
D6	Provides evidence to show when they analyse the risks and opportunities to implementing change.

Pass Grading Descriptors	
D7	Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended alternative methods likely to improve results, stating reasons for choice.
D8	Evidence to show when they have proactively gathered customer feedback, through a variety of methods and used alternative recommendations to change the customer service level agreement in order to provide an improved service.
D9	Demonstrates an ability to identify trends/recurring issues and analyse why they occurred and record possible ways of addressing them to ensure they do not reoccur.

To achieve a pass, apprentices must meet **all** of the pass grading descriptors.

To achieve a distinction, apprentices must meet **all** of the pass and **all** the distinction grading descriptors.

A fail grade would be given where an apprentice does **not** meet all of the pass grading descriptors.

Work Based Project - Knowledge, Skills and Behaviours

Ref	Criteria
Knowledge	
K1	Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation
K3	Understand your organisation's current business strategy in relation to customers and make recommendations for its future
K4	Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions
K6	Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience
K8	Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation
K16	Understand your business environment and culture and the position of customer service within it
K17	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	
S1	Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice
S7	Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction
S11	Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it
S12	Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service

S15	Analyse the end-to-end service experience, seeking input from others where required, supporting development of solutions
S16	Make recommendations based on your findings to enable improvement
S17	Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice

Professional Discussion (supported by portfolio evidence)

The apprentice and the IEPA will have a formal two-way conversation, allowing the apprentice to evidence the grading descriptors assigned to this assessment method. A portfolio of evidence may be used by the apprentice to provide evidence to support the discussion and will not in itself be assessed or contribute to the overall grade.

The professional discussion must be conducted on a 1:1 basis in a controlled environment free from distraction or influence. The discussion can take place face-to-face or remotely via video conferencing. The discussion will be recorded.

The apprentice will extract, from their portfolio, evidence which is suitable for supporting them in their professional discussion. This evidence will consist of a minimum of 10 pieces of evidence to a maximum of 15 pieces and related to the standards which apply to the professional discussion. This could include witness statements, customer feedback such as emails or letters, manager feedback from one-to-one or alike.

Assessment Timing

The professional discussion will last for 60 minutes (+/- 10%).

Pass and distinction grading criteria for the Professional Discussion are in the following table.

Professional Discussion - Grading Descriptors

Pass Grading Descriptors	
P1	Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments.
P2	Evidence of how they identify the different types of leadership styles that work best in their customer environment.
P3	Demonstrates when they have balanced the meeting of their customer and their organisation's needs while showing they have considered cost implications.
P4	Demonstrate sharing own knowledge and experience with others, to support colleague development.
P5	Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.
P6	Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.
P7	Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations.

Pass Grading Descriptors	
P8	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.
P9	Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.
P10	Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.
P11	Evidences knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development.
P12	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.
Distinction Grading Descriptors	
D1	Evidences when they have assessed the impact of sharing their own knowledge on: a. their development b. colleague development
D2	Evidences when they have analysed the importance of their professional image and its relationship with the organisation's brand.
D3	Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach.

To achieve an overall pass, apprentices must achieve **all** of the pass grading descriptors.

To achieve a distinction, apprentices must meet **all** of the pass and **all** of the distinction grading descriptors.

A fail grade would be given where an apprentice does **not** meet all of the pass grading descriptors.

Professional Discussion - Knowledge, Skills and Behaviours

Ref	Criteria
Knowledge	
K2	Understand the impact your service provision has on the wider organisation and the value it adds
K5	Understand a range of leadership styles and apply them successfully in a customer service environment
K7	Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention
K9	Understand commercial factors and authority limits for delivering the required customer experience
K10	Know your internal and external customers and how their behaviour may require different approaches from you

Ref	Criteria
K12	Understand what drives loyalty, retention and satisfaction and how they impact on your organisation
K18	Understand how to find and use industry best practice to enhance your own knowledge
Skills	
S2	Resolve complex issues by being able to choose from and successfully apply a wide range of approaches
S8	Demonstrate a cost-conscious mind-set when meeting customer and the business needs
Behaviours	
B1	Proactively keep your service, industry and best practice knowledge and skills up to date
B2	Consider personal goals related to service and take action towards achieving them
B5	Make realistic promises and deliver on them
B8	Share knowledge and experience with others to support colleague development

Grading

Practical Observation

- If one or more pass grading descriptors are not met, the assessment will be graded as a fail.
- To achieve a pass **all** pass criteria must be met.
- To achieve a distinction **all** pass criteria **and** all distinction criteria must be met.

Work Based Project

- If one or more pass grading descriptors are not met, the assessment will be graded as a fail.
- To achieve a pass **all** pass criteria must be met.
- To achieve a distinction **all** pass criteria **and** all distinction criteria must be met.

Professional Discussion

- If one or more pass grading descriptors are not met, the assessment will be graded as a fail.
- To achieve a pass **all** pass criteria must be met.
- To achieve a distinction **all** pass criteria **and** all distinction criteria must be met.

Overall grade

The grades from individual assessment methods will be combined in the following way to determine the overall grade:

Practical Observation	Work Based Project	Professional Discussion	Overall grade
Fail	Any grade	Any grade	Fail
Any grade	Fail	Any grade	Fail
Any grade	Any grade	Fail	Fail
Pass	Pass	Pass	Pass
Pass	Distinction	Distinction	Pass
Distinction	Pass	Distinction	Pass
Distinction	Distinction	Pass	Pass
Pass	Pass	Distinction	Pass
Pass	Distinction	Pass	Pass
Distinction	Pass	Pass	Pass
Distinction	Distinction	Distinction	Distinction

An overall pass grade must meet all pass criteria in all assessment methods.

An overall distinction grade must meet all the pass criteria and distinction criteria in all assessment methods.

If an apprentice fails any part of the end-point assessment, then it is a fail.

Resits and Retakes

Apprentices who fail one or more assessment method will be offered the opportunity to take a resit or a retake. If the apprentice fails any part of the end-point assessment, further development must be provided prior to a re-sit or re-take.

A re-take requires the apprentice to undertake further learning and therefore they would need to go through the Gateway process again.

Open Awards will provide feedback alongside the result notification to all apprentices who fail an assessment method. This feedback will be provided via the training provider, normally **within ten (10) working days** of the assessment taking place.

Resits or retakes are only to be taken in the event that the original assessment grade is a fail. A resit or retake cannot be taken with the intention of increasing the original grade if an apprentice has passed their EPA. Therefore, feedback will not normally be provided to apprentices who achieve a pass or higher.

The maximum grade that can be achieved for a resit or retake is a pass. Where an apprentice believes exceptional circumstances impacted on their initial assessment attempt, they must submit a formal request with supporting evidence for exceptional circumstances to be considered, directly to Open Awards **within five (5) working days** of receiving the assessment decision.

Please note:

Resits and retakes must be completed within 12 months of the gateway date otherwise the entire EPA will need to be taken again. The number of resits and retakes that can be taken by an apprentice will normally be at the discretion of the employer. In line with ESFA resit expectations, unless otherwise specified or limited within the assessment plan, Open Awards will provide two (2) resit or retake opportunities.

Work-based project

If an apprentice fails the work-based project, they will be asked to rework their project taking account of feedback from the independent assessor. Apprentices will have 1 month to rework their submission. Apprentices will be able to submit previous evidence along with the new additional evidence. This component resit (or retake) should be completed remotely.

Practical Observation

This component resit (or retake) should be completed face-to-face in the apprentice's workplace.

Professional discussion

This component resit (or retake) should be completed remotely.

Quality assurance

Independent End-point Assessor Standard Requirements

Independent End Point Assessors must meet the following criteria:

- Understanding of the customer service sector and of the role covered by the apprenticeship.
- Current occupational competence of 2 years or more.
- No direct relationship with the apprentice, employer or training provider.
- Hold or working towards a qualification to undertaken assessment and verification activity (i.e. PGCE, Cert Ed or Assessor/Verifier qualifications) and/or have significant knowledge and expertise in providing consistent and appropriate judgements of an apprentice's skill and ability.

Internal quality assurance

Open Awards will complete quality assurance on assessments before results are released. Quality assurance is completed through observations and examination of documentation on a risk-based sampling model.

External quality assurance

External quality assurance for this apprenticeship standard is undertaken by Ofqual.

Assessment Specification

The assessment specification can be found on our website and on IfATE's website in the published assessment plan for the standard. Details of which elements of the apprenticeship standard will be tested by each test are given below.

Mapping of Knowledge, Skills, and Behaviours

Key:	
Practical Observation	PO
Work Based Project	WBP
Professional Discussion	PD

Ref	KSB to be assessed	Assessment Method
Knowledge		
Business Knowledge and Understanding		
K1	Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation	WBP
Apprentices need to understand the principles of continuous improvement in a service context, such as identifying inefficiencies, suggesting improvements, and understanding the potential impact of these changes on operations, customer satisfaction, and organisational goals.		
K2	Understand the impact your service provision has on the wider organisation and the value it adds	PD
Apprentices need to understand how their role and service delivery contribute to the organisation's overall success, including its impact on brand reputation, customer retention, and financial performance. They should be able to quantify the value added through metrics or feedback.		
K3	Understand your organisation's current business strategy in relation to customers and make recommendations for its future	WBP
Apprentices need to understand the organisation's business strategy, particularly how it relates to customer engagement, satisfaction, and loyalty. This involves understanding how to identify areas for improvement or potential growth and propose actionable recommendations for future strategies.		
K4	Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions	WBP
Apprentices should understand how forward-thinking and anticipatory action can benefit customer service outcomes and the organisation. This includes understanding market trends, customer expectations evolution, and technological advancements.		
K5	Understand a range of leadership styles and apply them successfully in a customer service environment	PD
Apprentices need to understand different leadership styles (e.g., authoritarian, democratic, transformational) and their appropriateness in various customer service		

Ref	KSB to be assessed	Assessment Method
scenarios. Apprentices should understand how to adapt their leadership approach to motivate teams, resolve conflicts, and drive service excellence.		
Customer Journey knowledge		
K6	Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience	WBP
Apprentices should be able to map customer journeys, identify potential challenges or pain points, and evaluate the overall experience from first contact to post-service follow-up. They should suggest improvements to enhance the journey.		
K7	Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention	PD
Apprentices need to understand the processes and criteria for escalating customer issues, recognising when specialist knowledge or authority is required to resolve complex situations effectively.		
K8	Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation	WBP
Apprentices need to understand internal processes and how they support service delivery, including order processing, complaint handling, and feedback mechanisms.		
K9	Understand commercial factors and authority limits for delivering the required customer experience	PD
Apprentices need to understand budgetary constraints, pricing strategies, and authority limits within which employees must operate to deliver customer service, including how to handle requests that exceed these limits.		
Knowing your customers and their needs/ Customer Insight		
K10	Know your internal and external customers and how their behaviour may require different approaches from you	PD
Apprentices need to be able to identify various customer types (internal and external) and adapt communication styles and service approaches to meet their diverse needs and behaviours.		
K11	Understand how to analyse, use and present a range of information to provide customer insight	PO
Apprentices need to understand how to collect, analyse and interpret data from customer interactions to gain insights into customer satisfaction and areas for service improvement.		
K12	Understand what drives loyalty, retention and satisfaction and how they impact on your organisation	PD
Apprentices need to understand factors that influence customer loyalty and satisfaction, and the impact of these factors on business outcomes such as repeat business and word-of-mouth referrals.		
K13	Understand different customer types and the role of emotions in bringing about a successful outcome	PO
Apprentices need to understand how to recognise different customer personalities and emotional states, and how to adapt service delivery to manage emotions and achieve positive outcomes.		
K14	Understand how customer expectations can differ between cultures, ages and social profiles	PO

Ref	KSB to be assessed	Assessment Method
Apprentices need to understand how cultural, generational, and social factors influence customer expectations and service preferences.		
Customer service culture and environment awareness		
K15	Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers	PO
Apprentices need to understand how to stay informed about industry regulations, compliance requirements, and their implications for customer service practices.		
K16	Understand your business environment and culture and the position of customer service within it	WBP
Apprentices need to understand the organisational environment, culture, values, and how customer service functions align with and support business objectives.		
K17	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	WBP
Apprentices need to understand the interdependencies between departments in delivering customer service and the potential impacts of service failures.		
K18	Understand how to find and use industry best practice to enhance your own knowledge	PD
Apprentices need to understand techniques for researching and applying industry best practices in customer service to continuous personal and professional development.		
Skills		
Business-focused service delivery		
S1	Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice	WBP
Apprentices will need to: <ul style="list-style-type: none"> • Demonstrate a mindset of continuous improvement, • Make informed decisions to support customer service delivery, for example by using customer feedback and industry trends. • Suggest service enhancements to support customer service delivery. 		
S2	Resolve complex issues by being able to choose from and successfully apply a wide range of approaches	PD
Apprentices will need to show problem-solving and conflict resolution skills, applying various strategies to address and resolve complex customer issues effectively.		
S3	Find solutions that meet your organisations needs as well as the customer requirements	PO
Apprentices will need to balance customer requirements with organisational needs, finding solutions that satisfy both parties.		
Providing a positive customer experience		
S4	Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes	PO
Apprentices will need to use advanced communication skills to understand customer needs, clarify situations, and negotiate solutions that are agreeable to both the customer and the organisation.		

Ref	KSB to be assessed	Assessment Method
S5	Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy	PO
Apprentices will need to effectively manage difficult customer interactions, making recommendations for service improvements based on these experiences.		
S6	Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps	PO
Apprentices will need to communicate clearly and effectively, offering options and guidance to help customers make informed decisions about the services or products they receive.		
S7	Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction	WBP
Apprentices will need to analyse customer feedback and service interactions to understand the customer experience fully, using this insight to drive improvements and positive outcomes.		
S8	Demonstrate a cost-conscious mind-set when meeting customer and the business needs	PD
Apprentices will need to make decisions and provide solutions that consider both the cost implications for the organisation and the value delivered to the customer.		
S9	Identifying where highs and lows of the customer journey produce a range of emotions in the customer	PO
Apprentices will need to recognise emotional highs and lows throughout the customer journey, understanding how to enhance positive emotions and mitigate negative ones.		
S10	Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format	PO
Apprentices will need to communicate complex information clearly and concisely, in both written and verbal forms, to ensure customers understand and are satisfied with the information provided.		
Working with your customers / customer insights		
S11	Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it	WBP
Apprentices will need to employ methods for collecting customer feedback, analyse the data to draw meaningful conclusions, and take action to address feedback and improve service.		
S12	Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service	WBP
Apprentices will need to use analysis to understand different customer segments, predict their needs and expectations, and tailor services accordingly to enhance satisfaction.		
Customer service performance		
S13	Maintain a positive relationship even when you are unable to deliver the customer's expected outcome	PO
Apprentices will need to manage customer expectations and maintaining positive relationships, even when it's not possible to meet their initial requests.		
S14	When managing referrals or escalations take into account historical interactions and challenges to determine next steps	PO

Ref	KSB to be assessed	Assessment Method
Apprentices will need to consider previous customer interactions and challenges when managing escalations, using historical context to inform decisions and actions.		
Service improvement		
S15	Analyse the end-to-end service experience, seeking input from others where required, supporting development of solutions	WBP
Apprentices will need to collaborate with colleagues and stakeholders to thoroughly analyse the customer service experience from start to finish, identifying opportunities for improvement.		
S16	Make recommendations based on your findings to enable improvement	WBP
Apprentices will need to use analysis and insights to make evidence-based recommendations for service improvements.		
S17	Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice	WBP
Apprentices will need to stay informed about changes in legislation and industry standards, recommending and implementing updates to practices to ensure compliance and best practice.		
Behaviours		
Develop self		
B1	Proactively keep your service, industry and best practice knowledge and skills up to date	PD
Apprentices will need to commit to ongoing learning and professional development to maintain expertise in customer service, industry trends, and best practices.		
B2	Consider personal goals related to service and take action towards achieving them	PD
Apprentices will need to set personal development goals related to improving service delivery and take proactive steps to achieve these goals.		
Ownership/ Responsibility		
B3	Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation	PO
Apprentices will need to take personal responsibility for resolving customer issues, ensuring actions taken are in the best interest of both the customer and the organisation.		
B4	Exercises proactivity and creativity when identifying solutions to customer and organisational issues	PO
Apprentices will need to use creativity and proactive problem-solving to develop innovative solutions to customer and organisational challenges.		
B5	Make realistic promises and deliver on them	PD
Apprentices will need to ensure commitments to customers are realistic and achievable and follow through on these promises to build trust and satisfaction.		
Team working		
B6	Work effectively and collaboratively with colleagues at all levels to achieve results	PO
Apprentices will need to foster teamwork and collaboration across the organisation to deliver exceptional customer service and achieve business objectives.		

Ref	KSB to be assessed	Assessment Method
B7	Recognise colleagues as internal customers	PO
Apprentices will need to treat colleagues with the same level of respect and service as external customers, recognising their needs and contributions to delivering quality service.		
B8	Share knowledge and experience with others to support colleague development	PD
Apprentices will need to contribute to the development of colleagues by sharing knowledge, experiences, and best practices in customer service.		
Equality		
B9	Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer	PO
Apprentices will need to maintain a positive attitude and an open mind to adapt service approaches to meet the unique needs and preferences of each customer.		
B10	Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment	PO
Apprentices will need to demonstrate flexibility in meeting customer needs while adhering to organisational policies and service standards.		
Presentation		
B11	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction	PO
Apprentices will need to champion the organisation's brand, values, and beliefs in every customer interaction to build trust, credibility, and enhance customer satisfaction.		
B12	Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand	PO
Apprentices will need to present oneself professionally in all communications, ensuring that personal presentation aligns with and positively reflects the organisation's brand.		

Open Awards Policies

Current versions of the following Open Awards policies are accessible through the Secure Portal.

These policies include:

- End Point Assessment Pricing Policy
- Reasonable Adjustments and Special Considerations Policy
- Data Protection
- Enquiries and Appeals Policy
- Complaints Policy
- Malpractice and Maladministration Policy
- Equality and Diversity Policy
- Sanctions Policy
- Safeguarding Policy
- Conflict of Interest Policy
- Fair Access Policy

In addition, the current version of the following relevant document may be obtained by training providers, employers or apprentices by contacting Open Awards directly:

- Instructions for Conducting Controlled Assessment Remotely

Support

For information about Open Awards support offer, including information on our policies, quality assurance, re-sits, appeals, complaints and general enquiries, please see our website: www.openawards.org.uk or contact our customer service team on 0151 494 2072 or via email at enquiries@openawards.org.uk.

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