

# CUSTOMER SERVICE SPECIALIST APPRENTICESHIP STANDARD

Standard Code ST0071  
Course Level 3  
Work Based  
Funding Level £4000  
Duration 18mths including EPA

## *Course Description*

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 environment including contact centres, retail, webchat, service industry or any customer service point.

## *Off the Job Training*

A key requirement of an Apprenticeship is Off-the-job training. This must make up at least 20% of the apprentice's contracted hours, over the total duration of the apprentice's planned training period. Off-the-job training must be directly relevant to the apprenticeship standard and must take place within the apprentice's normal working hours.

The new learning must be documented and reflected on through the Learner Journal on their e-portfolio.

## **Entry Requirements**

The Apprentice will need to be in a relevant role and show a willingness to undertake the knowledge, skills and behaviours required. They will also need to have Level 2 Maths and English (GCSE at Grade 4/C or above or equivalent) or be prepared to attend a block study period for Maths and English if this is required.

Apprentices may be required to attend an interview and undertake relevant skills assessments.

Once they have been accepted on to the programme all apprentices will be required to attend a Lincoln College Induction. Apprentices will require access to a tablet/computer to access their e-portfolio.

## **Knowledge, Skills and Behaviours**

### **KNOWLEDGE**

#### **Business knowledge and understanding:**

- Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation.
- Understand the impact your service provision has on the wider organisation and the value it adds.
- Understand your organisation's current business strategy in relation to customers and make recommendations for its future.
- Understand the principles and benefits of being able to think about the future when taking action or making service related decisions.
- Understand a range of leadership styles and apply them successfully in a customer service environment.

#### **Customer journey knowledge:**

- Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience.
- Understand the reason why customer issues and complex situations sometimes need referral or escalation for specialist attention.
- Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation.
- Understand commercial factors and authority limits for delivering the required customer experience.

### **Knowing your customers and their needs/customer insight:**

- Know your internal and external customer and how their behaviours may require different approaches from you.
- Understand how to analyse, use and present a range of information to provide customer insight.
- Understand what drives loyalty, retention and satisfaction and how they impact on your organisation.
- 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.

### **Customer service culture and environment awareness:**

- Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers.
- 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.
- Understand how to find and use industry best practice to enhance own knowledge.

### **Interpersonal Skills**

- Use a range of questioning skills, including listening and responding in a way that builds rapport, determines customer needs and expectations and achieves positive engagement and delivery.

### **Communication Skills: Depending on your job role and work environment:**

- Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or
- Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions.
- Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand.

### **Influencing Skills**

- Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation.

### **Personal Organisation**

- Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines.

### **Dealing with Customer Conflict and Challenge**

- Demonstrate patience and calmness. Show you understand the customer's point of view.
- Use appropriate sign-posting or resolution to meet your customers' needs and manage expectations.
- Maintain informative communication during service recovery.

## SKILLS

### **Business focused service delivery:**

- Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice.
- Resolve complex issues by being able to choose from and successfully apply a wide range of approaches.
- Find solutions that meet your organisations needs as well as the customer requirements.

### **Providing a positive customer experience:**

- Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes.
- Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy.
- Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps.
- Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction.
- Demonstrate a cost-conscious mind-set when meeting customer and the business needs.
- Identifying where highs and lows of the customer journey produce a range of emotions in the customer.
- Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format.

### **Working with your customers/ customer insights:**

- 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.

### **Customer service performance:**

- Maintain a positive relationship even when you are unable to deliver the customer's expected outcome.
- When managing referrals or escalations considers historical interactions and challenges to determine next steps.

### **Service improvement:**

- 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.

## BEHAVIOURS

### Developing self:

- Proactively keep your service, industry and best practice knowledge and skills up-to-date.
- Consider personal goals related to service and act towards achieving them.

### Ownership/responsibility:

- 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.
- Make realistic promises and deliver on them.

### Team working:

- Work effectively and collaboratively with colleagues at all levels to achieve.
- Recognise colleagues as internal customers.
- Share knowledge and experience with others to support colleague development.

### Equality:

- 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.

### Presentation:

- 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

Assessment is done through a combination of practical tasks, written assignments, oral discussions and online tests throughout the programme. To ensure that we can support you to meet these, we will complete an in-depth initial skills analysis to ensure that we can tailor our delivery to meet these unique requirements. We will then use the most relevant delivery methods to support your learners which include:

- One to one coaching from a dedicated, professional tutor allocated to the learner for the duration of the programme.
- Work based assignments and projects.
- Webinar delivery Case studies & desk top simulations.
- Job shadowing and mentoring.
- Employer led technical training.
- Independent learning and research.

## End Point Assessment

There will be an End Point Assessment (EPA) as the final stage of an Apprenticeship. The Apprentice must demonstrate their learning to an independent end point assessor and the overall grade available is distinction, merit, pass or fail.

The EPA consists of the following three assessments.

**Practical observation with Q&As.** The practical observation is covered in one session, lasting 1 hour +/- 10% tolerance either way. 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. The observation must include questioning to clarify knowledge and understanding is being applied.

**Work based project, supported by an interview.** 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 written report must be 2500 words (+/- 10%), excluding annexes. 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.

**Interview to Support the Work Based Project.** The work-based project will be supported by an interview. The interview will take place with an independent assessor. The interview will last for 60 minutes (+/- 10%)

- The interview will focus on the written project and any supporting annexes.
- The interview can take place either face-to-face or via online video conferencing, if appropriate.

**Professional discussion supported by portfolio evidence.** The professional discussion will last for 60 minutes (+/- 10%). 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. 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. The portfolio of evidence is not directly assessed.

## Progression

Completion of this apprenticeship will lead to eligibility to join the Institute of Customer Service as an Individual member at Professional level.

Should you choose to progress on a customer service career path, you may be eligible for further professional membership including management.

## **Fees**

As an Apprentice, you will pay no course fees. However, your employer may have to pay towards your training as well as providing you with a wage. All Apprentices must receive a minimum wage of £4.30 per hour within their first year of training from their employer, although they can, and often do, pay more. In the second and subsequent years of an Apprenticeship programme, the national minimum wage for your age would apply.

If you are an employer and want to find out more information regarding employer contributions and any further costs related to the Apprenticeship programme, please contact our dedicated Apprenticeship team at [employers@lincolncollege.ac.uk](mailto:employers@lincolncollege.ac.uk)

## **Business Benefits**

Employers have designed the Apprenticeship Standards to meet the needs of the sector and industry. Ensuring they include:

- Relevant Knowledge, skills and behaviours ensure that the Standard is relevant to the occupation.
- Widening participation Apprenticeship standards provide opportunities to employees that may not previously have been available.
- Development tools A cost effective way to train your employees to undertake specific roles in your business.
- Return on Investment On average, an apprentice who has completed their course will increase business productivity by £214 per week (CEBR, 2015).