

**CUSTOMER SERVICE SPECIALIST**  
**LEVEL 3 APPRENTICESHIP**





## WHAT IS IT?

This apprenticeship is ideal for all professionals who deal directly with customer support and is suitable for all sectors and organisation types and is ideal for any customer support services.

## WHY IS IT IMPORTANT?

A customer service specialist is an advocate of customer service and acts as a referral point for dealing with more complex or technical customer requests, complaints, and queries. They are often an escalation point for complicated or ongoing customer problems. As experts in your organisation's products and/or services, they share knowledge within the team and to colleagues. This role gathers and analyses data and customer information that influences change and improvements in service. Utilising both organisational and generic IT systems to carry out the job with an awareness of other digital technologies.

## PROGRESSION

This apprenticeship provides an ideal stepping stone into specialist, team leading, supervisory or first line management roles. They can choose to progress on to higher- level training and apprenticeships.

## COURSE DETAILS

### **Entry requirements:**

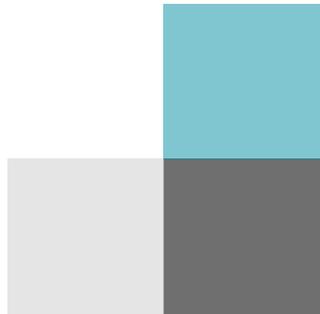
Set by the employer, but it is recommended that individuals with more advanced inter-personal skills and experience of working with customers in some capacity are selected.

### **Course Length:**

15 months minimum

### **Functional Skills:**

Functional skills level 2 English and Maths (if not already attained)



# 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 reasons 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 customers and how their behaviour 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

## KNOWLEDGE (CONTINUED)

### 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

## 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

## SKILLS (CONTINUED)

### 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 take into account 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/ ATTITUDE

### Develop self

- 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

### 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 results.
- Recognise colleagues as internal customers
- Share knowledge and experience with others to support colleague development

## BEHAVIOURS/ ATTITUDE (CONTINUED)

### 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 GATEWAY

The End-point Assessment should only commence once the employer is confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard which, as a best practice recommendation, could be clearly evidenced by the on-programme progression meetings and records. The apprentice must have also achieved English and Maths at level 2.

## END-POINT ASSESSMENT AND COMPLETION

An apprentice will complete only after they have been independently assessed – this is called End Point Assessment. It takes place once the apprentice has successfully achieved the gateway assessment. On completion of End-point Assessment the apprentices will receive a pass, merit or distinction depending on the outcome of their assessment.

The type of assessment varies but for this Apprenticeship it consists of the following:



## PRACTICAL OBSERVATION

This will take around an hour and will take place in the work place. It will be undertaken by the Independent End-point Assessor and must:

- Reflect typical working conditions
- Allow the apprentice to demonstrate all aspects of the standard
- Take a synoptic approach to assessing the overall competence (skills, knowledge and behaviours)
- Be carried out on a one-to-one basis.

## WORK BASED PROJECT AND INTERVIEW

Apprentices submit a written report on a project they have carried out. This will be around 2500 words on a subject agreed by the employer. It should cover a specific high-level challenge and how the apprentice dealt with it, including actions, planning execution, solutions, recommendations ,policy changes and customer feedback.

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 interview to support the work base project will take around 60 minutes and will focus on the written project and supporting annexes. The interview can be face-to-face or via video conferencing, but must be undertaken in a suitable controlled environment.

It will consist of 10 competency based questions.

## PROFESSIONAL DISCUSSION

This will take around 60 minutes and will consist of the apprentice offering between 10-15 pieces of evidence to support the discussion. This can include emails, letters, manager feedback or similar. Again the discussion can be face-to-face or via video conferencing.

## COMPLETION

The Independent End-point Assessor confirms that each assessment element has been completed. The grade is determined by them based on the overall performance of the apprentice in the observation and professional discussion: Pass / Distinction / Fail is awarded.



## CONTACT US

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