



Pearson

Customer Service Practitioner Apprenticeship Standard

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Illustration by Nacho Rojo



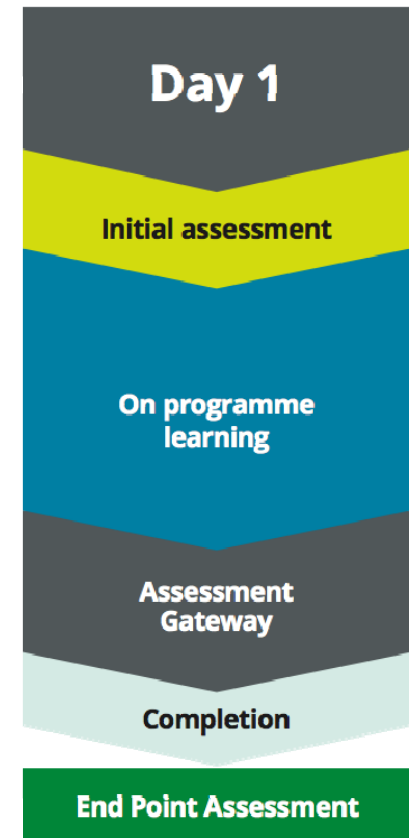
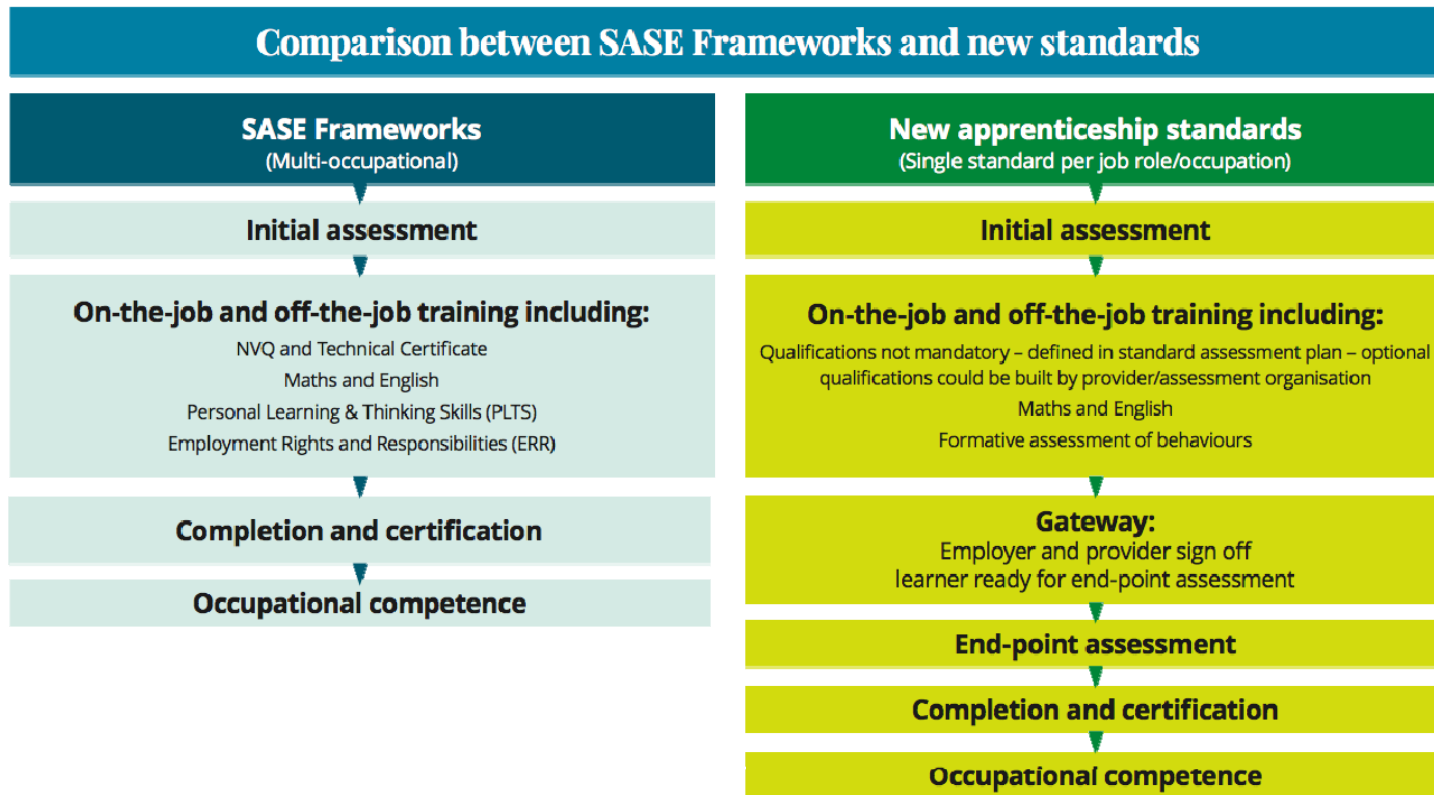
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What is the purpose of today?

- 1 Introductions
 - 2 The new Apprenticeship Standard
 - 3 On-programme support?
 - 4 End Point Assessment
 - 5 Why work with Pearson
-

What's changing?





SASE Framework withdrawals

- Phased withdrawal of SASE apprenticeship frameworks where replacement apprenticeship standards that cover the same occupations
- Education and Skills Funding Agency consultations - <https://www.gov.uk/government/publications/removal-of-apprenticeship-frameworks>
- The proposed last date for new starts on these frameworks is **31 March 2018**
 - Customer Service (Level 2 and 3)
 - Management (Level 2, 3, 4 and 5)
 - Business and Professional Administration (Level 4)
 - Providing Financial Services (Level 3)
- **Final list for withdrawal announced in May 2017. If withdrawal is deferred, the framework will be included in the next batch of proposed withdrawals.**

Register of Apprenticeship Assessment Organisations

Pearson are an approved End Point Assessment Organisation for the following new apprenticeship standards:

- **Customer Service Practitioner**
- Financial Services Customer Adviser
- Senior Financial Services Customer Adviser
- Team Leader / Supervisor
- Operational / Departmental Manager



**Customer Service
Practitioner
Level 2**

Customer Service Practitioner Apprenticeship Standard

Duration: Minimum of twelve months

Entry requirements: Achievement of Level 1 Maths and English

Knowledge

- Knowing your customers
- Understand the organisation
- Meeting regulations and legislation
- Systems and resources
- Your role and responsibility
- Customer experience
- Product and service knowledge

Illustration by Lucy Vigrass



Skills

- Interpersonal skills
- Communication
- Influencing skills
- Personal organisation
- Dealing with customer conflict and challenge

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Behaviours

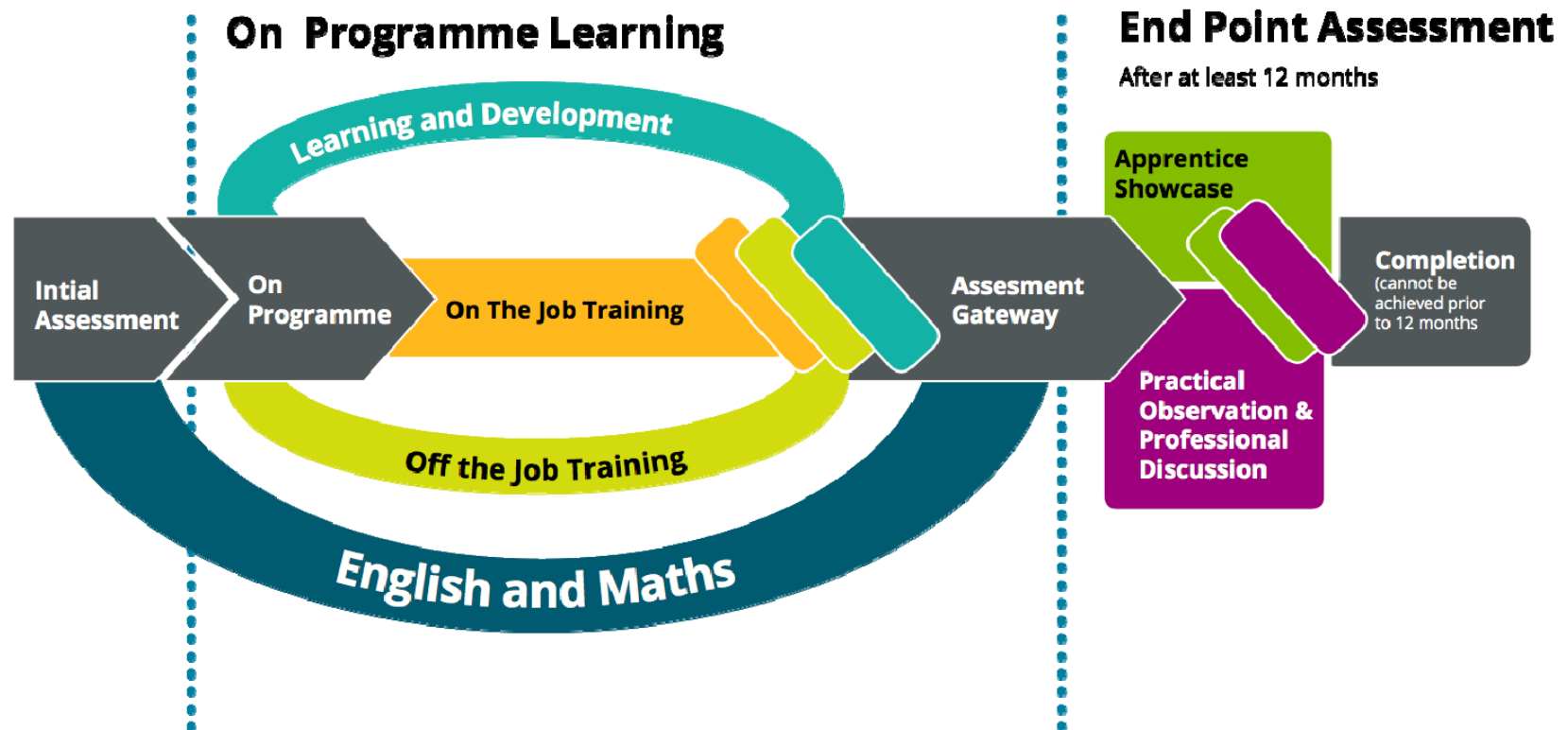
- Developing self
- Being open to feedback
- Team working
- Equality – treating all customers as individuals
- Presentation – dress code, language
- Right first time

Illustration by Laura Rolwing



Customer Service Practitioner

End to End Delivery and Assessment



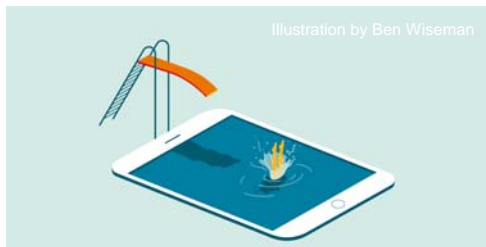
Customer Service Practitioner Occupational Brief

Module	Standard	What do I need to know	Pass Criteria	Distinction Criteria	Method of Assessment
Knowing your customers	1. Understand who customers are	1.1 Who are my customers?	Explain the difference between internal and external customers in the context of their organisation	Explain the importance of building good relationships to the organisation	Professional Discussion
		1.2 Who are the organisations customers?			
		1.3 Describe the different types of customers?			
	2. Understand the difference between internal and external customers	2.1 What is an internal customer?			
		2.2 What is an external customer?			
		2.3 Who are the organisations internal customers?			
		2.4 Who are the organisations external customers?			
		2.5 What is the difference between internal and external customers to the organisation?			
	3. Understand the different needs and priorities of your customers and the best way to manage their expectations, recognising and knowing how to adapt style to be highly effective	3.1 What is the purpose of customer service?	Describe the specific needs of different customers, including those protected under current Equality Law.	Explain the importance of balancing the needs of both the organisation and its customers.	
		3.2 What are the different needs of your customers?			
		3.3 What are the different priorities of your customers?			
		3.4 Identify the specific needs that customers may have, including those that are protected under current equality law?			
3.5 What is meant by customer expectations?		Explain when and how to adapt their service approach to meet the needs and expectations of customers			
3.6 How does the standard of customer service affect the success of your					

Customer Service Practitioner Grading Criteria

For each of the three assessment methods, all pass criteria (100%) must be achieved to progress and complete the apprenticeship

Apprentice Showcase



70%

Minimum distinction criteria

The apprentice must achieve all pass criteria and a minimum of 7 out of 10 distinction criteria

Observation



80%

Minimum distinction criteria

The apprentice must achieve all pass criteria and a minimum of 4 out of 5 distinction criteria

Professional Discussion



75%

Minimum distinction criteria

The apprentice must achieve all pass criteria and a minimum of 3 out of 4 distinction criteria

Qualifications to support on-programme

Landscape

- Qualifications are, in the main, non mandatory within 'business' apprenticeship standards
- Decision often driven by DFE/SFA as opposed to the employer choice

Action

- Pearson BTEC Level 2 Diploma in Customer Service mapped to the modules within the Customer Service Practitioner Standard

Solution

- Diploma can be used as 'the vehicle' to support a structured programme of teaching and learning and to support evidence generation
- Phased recognition during the apprenticeship
- Uploaded to website and password protected with customers EOL credentials
- Optional

Illustration by Tang Yau Hoong



Funding for qualifications

- Funding cannot can be used for the registration/examination/certification costs of non-mandated qualifications
- Funding can be used for some or all of the delivery where there is clear overlap between this training and the knowledge, skills and behaviours needed for the apprenticeship standard.
- Employers need to cover the costs of registration/examination/certification costs.
- Employers could cover costs of delivery where there is no overlap

Mapping



Mapping of Customer Service Practitioner Apprenticeship Standard against Pearson BTEC Level 2 Diploma in Customer Service (601/3424/0)

Module	Standard	What do I need to KNOW	Mapping to Pearson BTEC Level 2 Diploma in Customer Service (601/3424/0)	Coverage
1. Knowing your customers	1. Understand who customers are	1.1 Who are my customers?		No coverage
		1.2 Who are the organisations customers?		No coverage
		1.3 Describe the different types of customers?	Unit 2 1.3 Describe the characteristics of challenging customers Unit 2 1.4 Explain how to identify dissatisfied customers	Partially met
2. Understand the difference between internal and external customers	2. Understand the difference between internal and external customers	2.1 What is an internal customer?	Unit 2 1.1 Explain the distinctions between internal and external customers	Fully met
		2.2 What is an external customer?	Unit 2 1.1 Explain the distinctions between internal and external customers	Fully met
		2.3 Who are the organisations internal customers?		No coverage
		2.4 Who are the organisations external customers?		No coverage
		2.5 What is the difference between internal and external customers to the organisation?	Unit 2 1.1 Explain the distinctions between internal and external customers Unit 17 1.7 Explain the importance of regular communication in the development of both internal and external customer relationships	Fully met
3. Understand the different needs and priorities of your customers and the best way to manage their expectations, recognising and knowing how to adapt style to be highly effective	3. Understand the different needs and priorities of your customers	3.1 What is the purpose of customer service?	Unit 3 1.1 Explain the purpose and scope of customer service Unit 17 1.1 Describe the importance of developing relationships with customers	Fully met
		3.2 What are the different needs of your customers?	Unit 1 1.1 Explain the relationship between customers' needs and expectations and customer satisfaction Unit 1 1.3 Explain the importance of treating customers as individuals	Fully met
		3.3 What are the different priorities of your customers?	Unit 3 3.1 Explain the difference between customers' wants, needs and their expectations Unit 3 3.2 Explain how to identify customers' needs and expectations	Partially met
		3.4 Identify the specific needs that customers may have, satisfaction	Unit 1 1.1 Explain the relationship between customers' needs and expectations and customer satisfaction	No coverage

Assessment Gateway

Purpose

- Employer, apprentice and trainer/assessor involved
- Check that apprentice has achieved the knowledge, skills and behaviours outlined in the standard
- Is apprentice ready for End Point Assessment – opportunity to progress

Checklist

- ✓ Find an Assessment Organisation for EPA
- ✓ Decide what month the apprentice will be doing EPA
- ✓ Contact the Assessment Organisation and book EPA



End Point Assessment

Customer Service Practitioner Apprenticeship

Interpreting the End Point Assessment Specification



Successful apprenticeship
achievement and certification

Apprentice Showcase

The apprentice showcase is compiled after 12 months of on-programme learning. The Apprentice Showcase is a summative portfolio in which apprentices will demonstrate, with the support of appropriate work-based evidence, how they have applied and used the identified knowledge, skills and behaviours to the required standards in their everyday work practice.

- 30 Pass Criteria and 10 Distinction Criteria
- Compiled against an assessment brief produced by Pearson
- Apprentices are required to complete three tasks.
 - Task one: Understanding your organisation
 - Task two: Understanding your role and responsibilities
 - Task three: Reflecting on own practice
- Expected to be completed within 8 hours including supervised and non supervised conditions
- Submitted electronically or hard copy. Apprentices also have the option of submission through a presentation

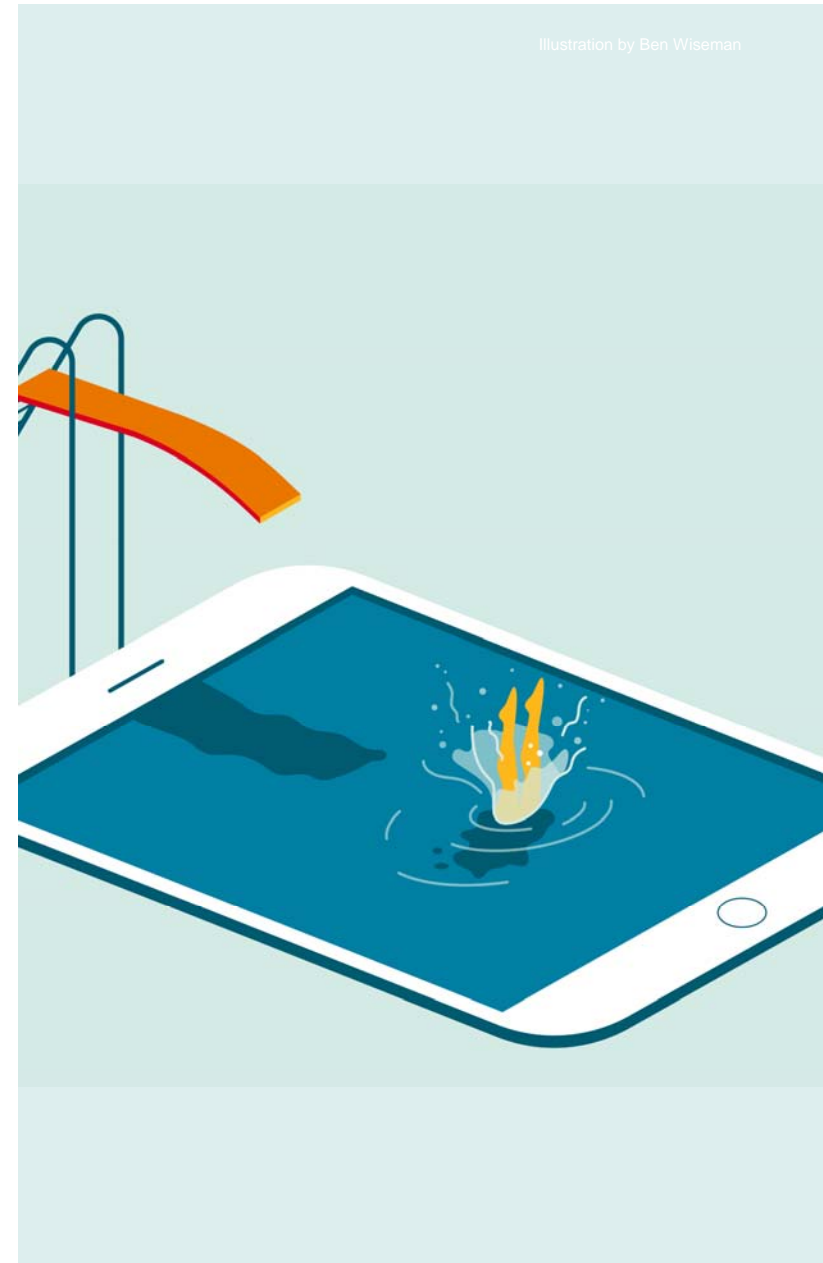
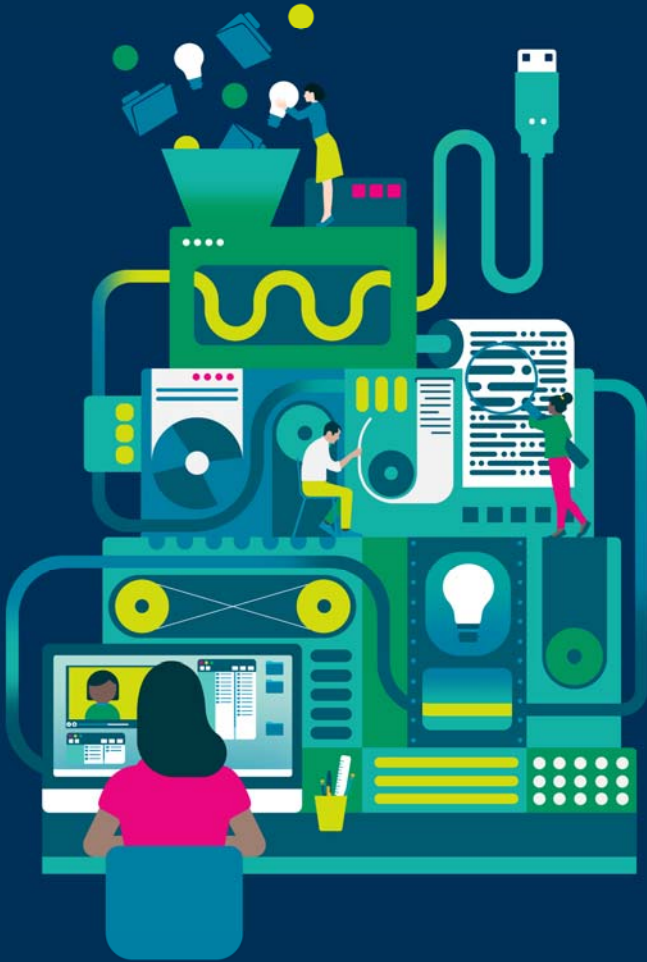


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Observation

The practical observation will be pre-planned and scheduled to when the apprentice will be in their normal place of work and will be carried out by the Independent Assessor.

- 25 Pass Criteria and 5 Distinction Criteria
- Observed in their normal work environment interacting with at least two customers in the delivery of customer service, either in face-to-face or non-face-to-face situations.
- Approximately one-hour assessment period.
- If the presence of the end-point assessor will become obtrusive then the observation can be done at a distance with the use of technology.
- Where there is not always the opportunity to observe evidence these performance criteria will be evidenced through real work-based evidence presented by apprentices after the live observation. (*Apprentice Showcase Task 3*)

Professional Discussion

The professional discussion will be a structured discussion between the apprentice and the Independent Assessor, following the observation, to establish the apprentice's understanding and application of knowledge, skills and behaviours.

- 7 Pass Criteria and 4 Distinction Criteria
- Apprentices will be asked a series of questions by the independent end-point assessor based on the standard outcomes and designed to draw out evidence against Pass and Distinction grade criteria
- Apprentices will be required to provide real-life examples of how they have applied the knowledge and understanding in carrying out their job role.
- A maximum of one-hour assessment period conducted face to face or virtually



End Point Assessment Delivery Models

Model	Description	Considerations
Direct Delivery	Procurement of “off the shelf” End Point Assessment for a specific Standard. End Point Assessment service covers all independent assessment requirements.	None
Partnership Delivery	<p>Sub-contract the physical assessment elements to another organisation to utilise their assessor resources.</p> <p>Pearson would be accountable for the EPA and would provide all other aspects within its role (e.g. assessment tools, specification design, resources, standardisation, assessor training etc.)</p> <p>Pearson would verify the quality of the assessments and internal quality assurance within the provider/individual assessors</p>	<p>Assessors must not be linked to any on-programme delivery of the apprentice</p> <p>Assessors must be employed within a separate organisation or separate legal business entity (e.g. a separate organisation with a separate team to deliver assessments)</p>

Pricing Models

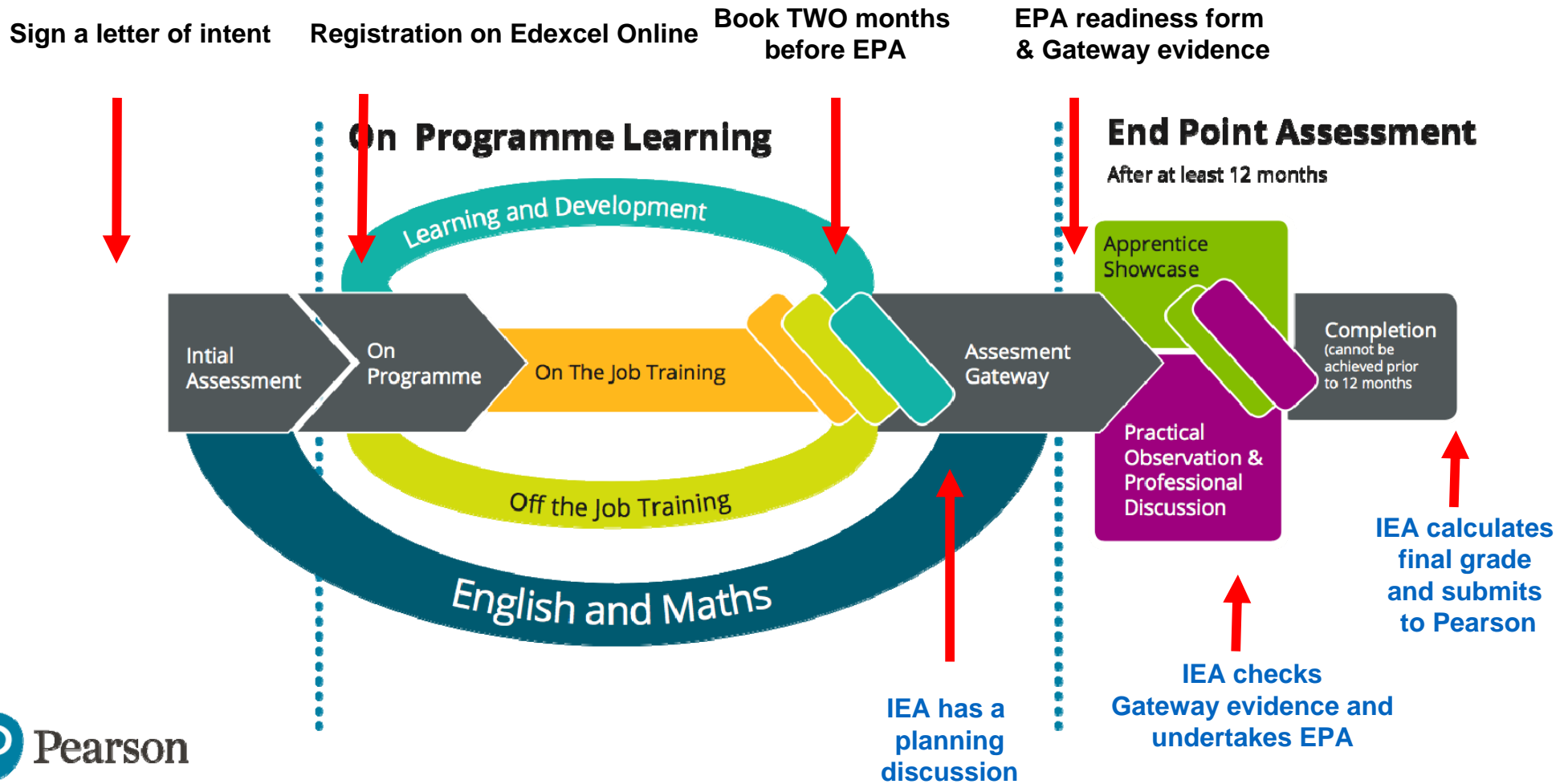
	Direct Delivery	Partnership Delivery
End Point Assessment including Qualification	£550.00	£350.00
End Point Assessment including Qualification and Functional Skills Maths & English	£577.80	£377.80

- Both models include full access to Apprentice 360



**End Point Assessment
Registration**

Case study – Customer Service





**Why work with Pearson on
the new apprenticeship
standards?**

