

# Customer Service Specialist Apprenticeship Standard



## Role/Occupation: Customer Service Specialist Level 3

**Overview:** A professional for direct customer support within all sectors and organisations

The main purpose of a customer service specialist is to be a 'professional' for direct customer support within all sectors and organisation types. They are an advocate of customer service who 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 an expert in their organisation's products and/or services, they share knowledge with their wider team and colleagues. They gather and analyse data and customer information that influences change and improvements in service. They utilise both organisational and generic IT systems to carry out their 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.

### DURATION

The apprenticeship will typically take 15 months to complete.

### ENTRY REQUIREMENTS

Entry requirements will be determined by individual employers.

### ENGLISH & MATHS

Apprentices without Level 2 English or Maths will need to achieve this prior to taking their End Point Assessment.

For those with an education, health and care plan or a legacy statement, the minimum English and Maths requirement is Entry Level 3. For those whose primary language is British Sign Language, BSL qualifications are an alternative to English qualifications.

### QUALIFICATIONS

There are no mandatory qualifications for this apprenticeship standard.

### LINK TO PROFESSIONAL REGISTRATION

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

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

## COMPETENCIES

Knowledge	What is required
Business Knowledge & Understanding	<ul style="list-style-type: none"> <li>Understand the organisation's current business strategy in relation to customers and make recommendation for its future</li> <li>Understand the impact their service provision has on the wider organisation and the value it adds</li> <li>Understand what continuous improvement means in a service environment and how recommendations for change impact the organisation</li> <li>Understand the principles and benefits of being able to think about the future when taking action or making service related decisions</li> <li>Understand a range of leadership styles and apply them successfully in a customer service environment</li> </ul>
Customer Journey Knowledge	<ul style="list-style-type: none"> <li>Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience</li> <li>Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention</li> <li>Understand the underpinning business processes that support them in bringing about the best outcome for customers and the organisation</li> <li>Understand commercial factors and authority limits for delivering the required customer experience</li> </ul>
Knowing Your Customers & Their Needs / Customer Insights	<ul style="list-style-type: none"> <li>Know their internal and external customers and how their behaviour may require different approaches</li> <li>How to analyse, use and present a range of information to provide customer insight</li> <li>Understand what drives loyalty, retention and satisfaction and how they impact on the organisation</li> <li>Understand different customer types and the role of emotions in bringing about a successful outcome</li> <li>Understand how customer expectations can differ between cultures, ages and social profiles</li> </ul>
Customer Service Knowledge & Environment Awareness	<ul style="list-style-type: none"> <li>Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers</li> <li>Understand the business environment and culture and the position of customer service within it</li> <li>Understand the organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong</li> <li>Understand how to find and use industry best practice to enhance own knowledge</li> </ul>

Skills	What is required
Business Focussed Service Delivery	<ul style="list-style-type: none"> <li>Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice</li> <li>Resolve complex issues by being able to choose from and successfully apply a wide range of approaches</li> <li>Find solutions that meet the organisation's needs as well as the customer requirements</li> </ul>

<b>Skills</b>	<b>What is required</b> <i>(Continued)</i>
Providing a Positive Customer Experience	<p>Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes</p> <p>Manage challenging and complicated situations within their level of authority and make recommendations to enable and deliver change to service or strategy</p> <p>Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps</p> <p>Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction</p> <p>Demonstrate a cost-conscious mind-set when meeting customer and business needs</p> <p>Identify where highs and lows of the customer journey produce a range of emotions in the customer</p> <p>Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format</p>
Working with Your Customers / Customer Insights	<p>Proactively gather customer feedback, through a variety of methods</p> <p>Critically analyse, and evaluate the meaning, implication and facts and act upon it</p> <p>Analyse customer types, to identify or anticipate their potential needs and expectations when providing customer service</p>
Customer Service Performance	<p>Maintain a positive relationship even when they are unable to deliver the customer's expected outcome</p> <p>When managing referrals or escalations take into account historical interactions and challenges to determine next steps</p>
Service Improvement	<p>Analyse the end to end service experience, seeking input from others where required supporting development of solutions</p> <p>Make recommendations based on these findings to enable improvement</p> <p>Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice</p>

<b>Behaviours</b>	<b>What is required</b>
Developing Self	<p>Proactively keep service, industry and best practice knowledge and skills up-to-date</p> <p>Consider personal goals related to service and take action towards achieving them</p>
Ownership / Responsibility	<p>Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and the organisation</p> <p>Exercise proactivity and creativity when identifying solutions to customer and organisational issues</p> <p>Make realistic promises and deliver on them</p>
Team Working	<p>Work effectively and collaboratively with colleagues at all levels to achieve results</p> <p>Recognise colleagues as internal customers</p> <p>Share knowledge and experience with others to support colleague development</p>
Equality	<p>Adopt a positive and enthusiastic attitude being open minded and able to tailor service to each customer</p> <p>Be adaptable and flexible to customer needs whilst continuing to work within the agreed customer service environment</p>

Behaviours	What is required ( <i>Continuous</i> )
Presentation	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction Ensure personal presentation, in all forms of communication, reflects positively on the organisation's brand

## ON-PROGRAMME DELIVERY

Each apprentice will be allocated a Coach to support ongoing learning and preparation for End Point Assessment. In addition Progress Reviews will take place regularly to ensure the apprentice is on track.

All apprentices will be invited to attend relevant workshops to support the development of their Knowledge, Skills and Behaviours.

## END POINT ASSESSMENT

The EPA consists of four assessment methods:

1. Practical Observation (with Q&As)
2. Work Based Project (supported by an interview)
3. Interview to Support the Work Based Project
4. Professional Discussion (supported by portfolio evidence)

The EPA will be conducted by an Independent External Assessment Organisation (IEAO).

## PROGRESSION

Please talk to us about progression from this apprenticeship.

## REALITY CHECK

- Apprentices who are completing this programme must have the opportunity to: gather and analyse data, put into place changes and improvements based on data analysis, use IT systems, analyse customer types and identify potential needs and expectations, make and implement recommendations, resolve customer issues
- Time and support required from the employer to the apprentice during the apprenticeship to include: regular Performance Reviews, relevant off the job training and preparation for the final EPA
- Expectation of significant amounts of study/work from the apprentice in order to meet the requirements of the apprenticeship
- Employer has to be involved in the EPA and provide support and time to the apprentice in preparation for the EPA

## COSTINGS

### Maximum Funding Band: £4,000

The cost of the apprenticeship will be negotiated with you in line with Government guidelines

Additional Costs:

- Optional - IT Functional Skills Level 2 - £200

**PLEASE CONTACT APPRENTICESHIPS@CIRENCESTER.AC.UK FOR FURTHER INFORMATION**

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