

# Customer Service Specialist EPA

## Customer Service Specialist Overview (9494)

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**Development Manager | Assessment and Development Team**

# Webinar content

- **Overview of standard & LIEPA Feedback**

- Preparing for Apprenticeship & Gateway
- Professional Discussion supported by portfolio of evidence
- Practical Observation with Q&As.
- Dispensation - Witness Testimony with Q&As

- **Work based Project with Interview & LIEPA Feedback**

- Project Proposal timeline
- Key criteria
- Case study
- Questions



# Poll question

# Customer Service Specialist Level 3

# EPA for Customer Service Specialist



**(Portfolio based)  
Professional  
Discussion**



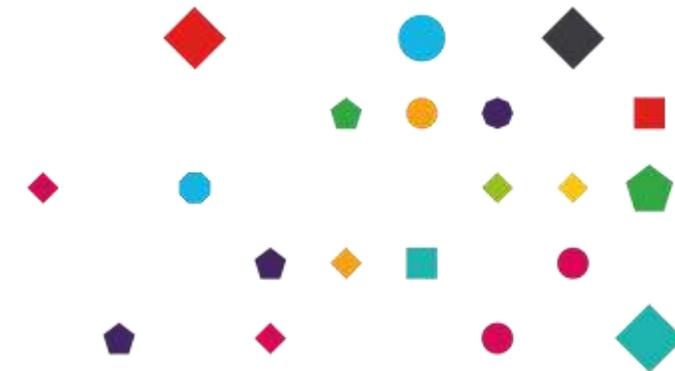
**Work based project – interview**



**Practical observation/Witness Testimony  
(with Q&As)**

## **Face to face EPAs**

It is strongly recommended that the **observation** is carried out **after** the portfolio based professional discussion





# The EPA consists of 3 components:

- Professional Discussion supported by Portfolio of Evidence (701/751)
- Work based Project, supported by Interview (702/752)
- Practical Observation supported by Q&A / Witness Testimony with Q&A (703/753)

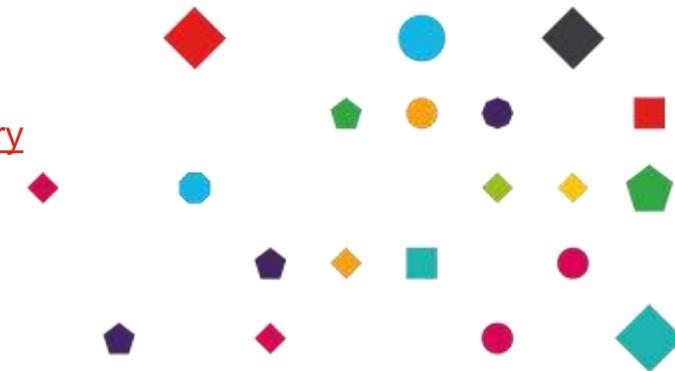
The components contribute towards the overall grade as follows:

<b>Assessment Method</b>	<b>% Contribution</b>
<b>Professional Discussion supported by Portfolio of Evidence</b>	<b>25%</b>
<b>Work based Project supported by Interview</b>	<b>30%</b>
<b>Practical Observation supported by Q&amp;A / Witness Testimony with Q&amp;A</b>	<b>45%</b>

# Preparing for the Apprenticeship

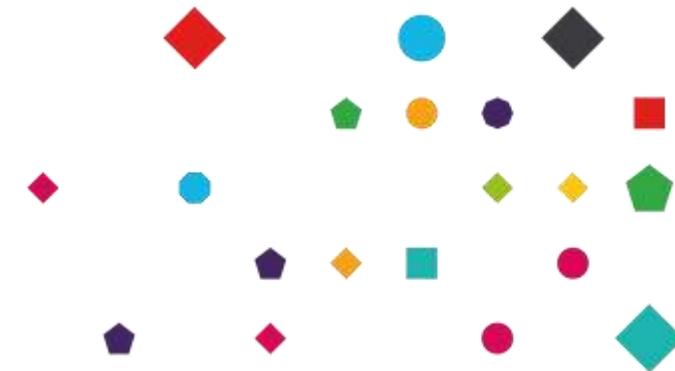
- Register your apprentice as soon as possible.
- Suitability check – Skills Scans are available from City & Guilds.
- Use the most up to date version on the EPA Pack for Customers.
- Ensure the job role will provide the apprentice with the scope breadth and depth to enable them to meet all areas of the standard.
- Current exemplars are now available on EPA Pro to support preparation.
- Read the Customer Report – trends / issues / areas of focus.
- Considerations for apprentices with special requirements.

<https://www.cityandguilds.com/delivering-our-qualifications/centre-development/centre-document-library>



# Preparing for Gateway

- Achieved Level 2 maths and English.
- Evidence of the relevant customer service knowledge, skills and behaviours as set out in the standard.
- Portfolio of evidence - minimum of 10 pieces of evidence – Maximum of 15 pieces.
- Prepared project proposal for consideration.
- Project time frame only starts once the proposal has been accepted.
- Witness testimony to confirm competency (if remote EPA).



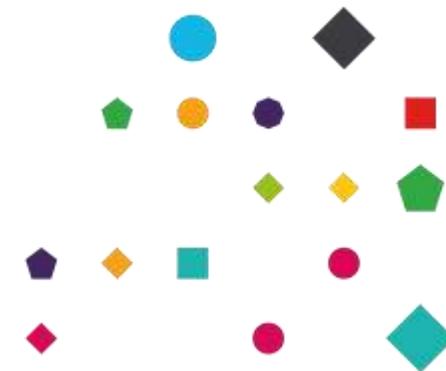
# End-point assessment (EPA) & Grading

## EPA

- The end-point assessment is the final stage that an apprentice goes through to complete their apprenticeship.

## Grading

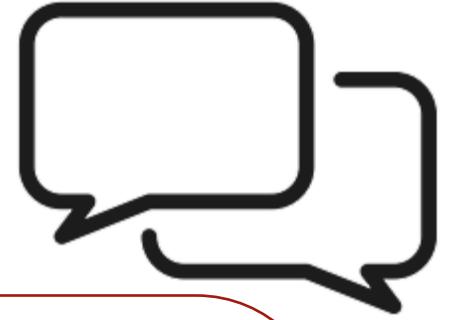
(Portfolio based) Professional Discussion	Work based project – interview	Practical observation/Witness Testimony (with Q&As)	Overall grading
Pass	Fail	Fail	Fail
Fail	Fail	Pass	Fail
Fail	Pass	Fail	Fail
Pass	Pass	Pass	Pass
Distinction	Pass	Pass	Pass
Pass	Distinction	Pass	Pass
Pass	Pass	Distinction	Pass
Distinction	Distinction	Pass	Pass
Pass	Distinction	Distinction	Pass
Distinction	Pass	Distinction	Pass
Distinction	Distinction	Distinction	Distinction



# Questions answers

Professional discussion supported  
by portfolio of evidence.

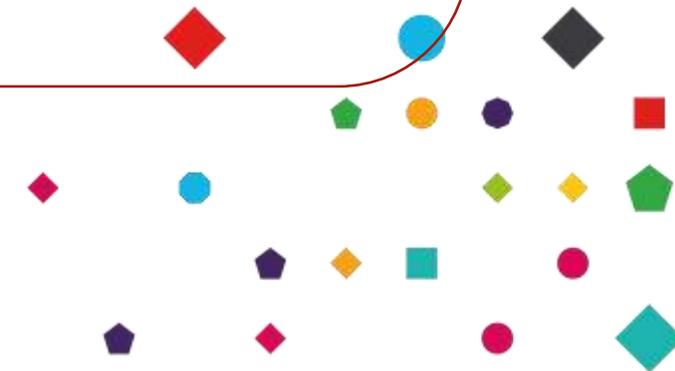
# Portfolio of evidence



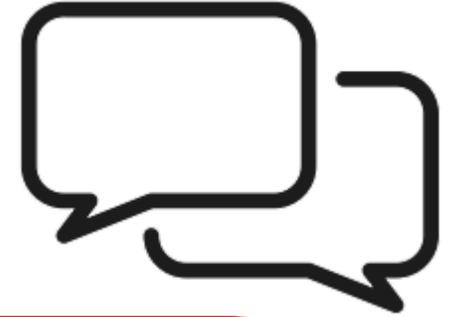
- Minimum of 10 pieces of evidence – Maximum of 15 pieces.
- Submit 2 weeks prior to EPA.
- Evidence not directly assessed – used for planning of the PD.
- Usual collection of apprentice's **best** forming a **holistic** overview.
- Submitted electronically to the City & Guilds e-portal.
- Examples include: Witness statements, customer feedback, manager feedback, reflective accounts, PDPs, CPD log, presentations, observations, report on e.g. complaints handling etc.

Does the evidence selected follow the below:

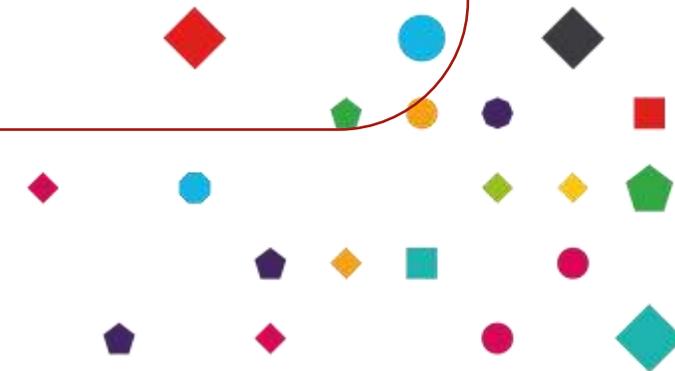
1. Which pieces holistically (most efficiently) give evidence that together cover all of the relevant criteria?
2. Is this the best evidence I have, showing that I have met all of the requirements for the distinction grade?



# Portfolio of evidence

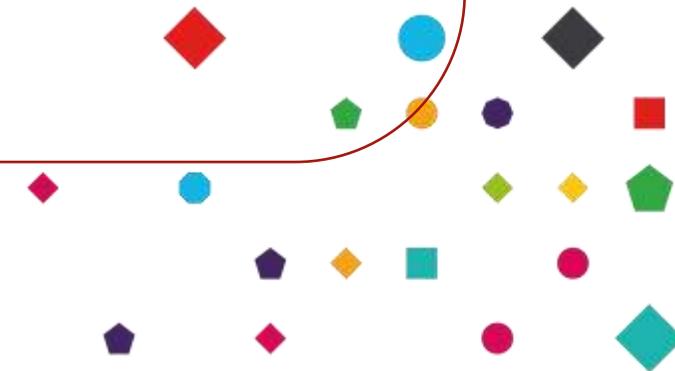


- Cross-reference each criterion to the relevant piece of evidence.
- Formally declare the authenticity of all evidence.
- Face to face or remote.
- Conducted in a suitable controlled environment.
- Ideally conducted on the same day .
- Duration is 60 minutes (10% tolerance).



# LIEPA Feedback

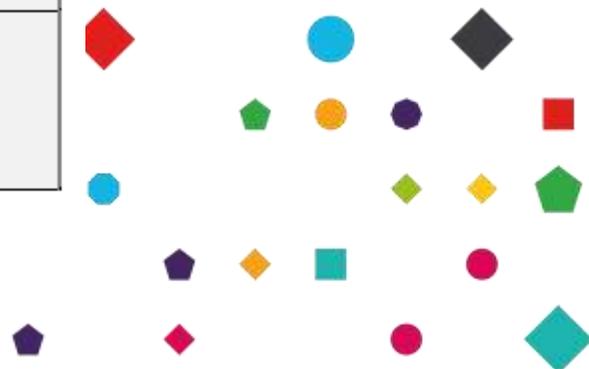
- Submit a completed portfolio evidence reference form.
- Reference evidence appropriately and ensure it is legible.
- Audio recordings are time stamped and referenced appropriately.
- Look for opportunities where evidence holistically maps to the standard.
- Anonymise customer information.
- Probe and question the apprentice about their evidence.
- Can they articulate their learning when explaining the evidence?
- The apprentice has their portfolio with them during the PD.
- Refer to the grade descriptor table and use this to support the compilation of evidence and the apprentice with preparation for the PD.
- Consideration to the distinction criteria.
- Quality assure the portfolio prior to submission.



## Level 3 Customer Service Specialist

### Assessment 701/751 Professional Discussion grade descriptors table

Standard module	City & Guilds Ref	Assessment requirement	Pass descriptors	Distinction descriptors
Business knowledge and understanding	PD1	Understand the impact your service provision has on the wider organisation and the value it adds	Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments.	Evidences when they have analysed the importance of their professional image and its relationship with the organisation's brand.
	PD2	Understand a range of leadership styles and apply them successfully in a customer service environment	Evidence of how they identify the different types of leadership styles that work best in their customer environment.	N/A
Customer journey knowledge	PD3	Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention	Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.	N/A
			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.	
	PD4	Understand commercial factors and authority limits for delivering the required customer experience	Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.	N/A



# Key Criteria – Professional discussion supported by portfolio of evidence

- **Business Knowledge**

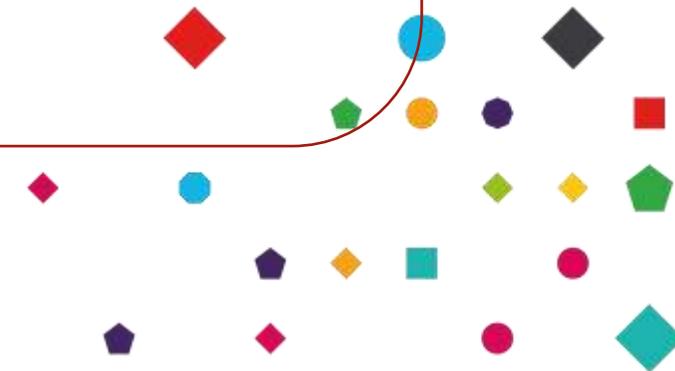
- Understand a range of leadership styles and apply them successfully in a customer service environment.

- **Customer Journey Knowledge**

- Understanding of why customer issues and complex situations sometimes need referral.
- Demonstrates responsibility and ownership in resolving customer issues.

- **Knowing your customers and their needs/customer Insight**

- Know your internal and external customers.
- Understand what drives loyalty, retention and satisfaction.



# Key Criteria - Professional discussion supported by portfolio of evidence

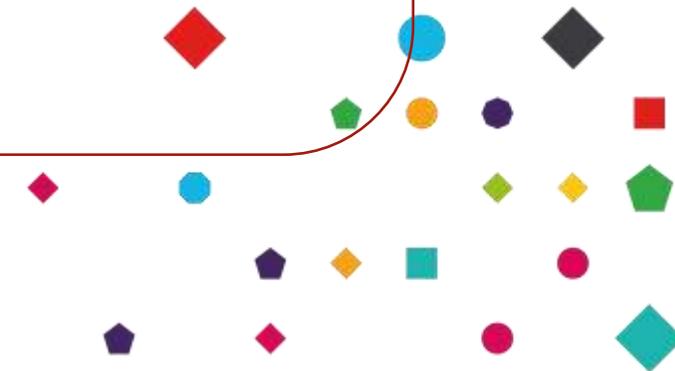
- **Providing a positive customer experience**

- Demonstrate a cost- conscious mind-set.
- Demonstrates responsibility and ownership in resolving customer issues.

- **Developing Self**

- Proactively keep your service, industry and best practice knowledge and skills up-to-date.

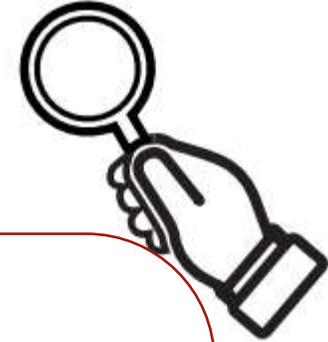
*Provides evidence to demonstrate how they have achieved learning and development goals, identified **in an agreed personal development plan**, in relation to their knowledge and skills of customer service, in the industry and best practice.*



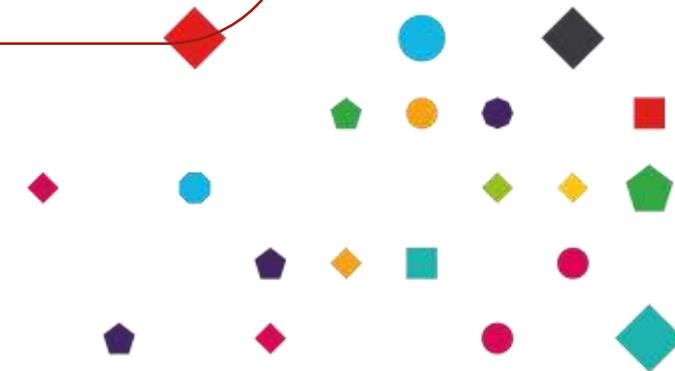
# Questions answers

# Practical observation (with Q&As)

# Practical observation (with Q&As)



- must include customer interaction
- ***undertaking a range of day to day workplace activities in the apprentice's workplace***
- ***interaction with at least 3 different customer types (customers with varying needs)***
- importance of time of day the observation takes place at
- supplementary Q&A may be carried out to seek further clarification on aspects not seen during  
the observation **in full** (appropriate environment required)
- Q&A is a maximum of 10 minutes
- time allowed 60 minutes (10% tolerance)

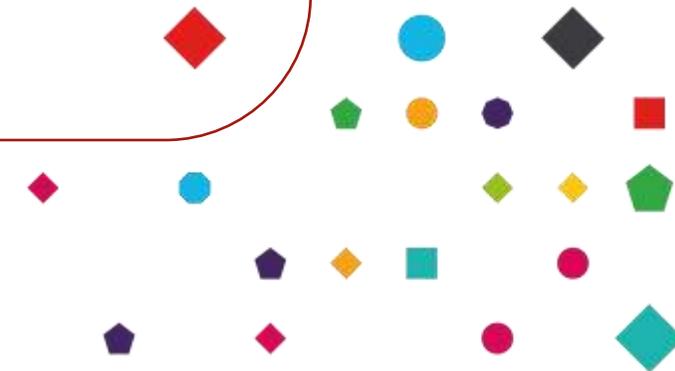


# Witness testimony dispensation (with Q&As)



## Provider support and involvement

- Supporting the employer – employer must complete but can be offered support.
- Discuss the evidence with the employer, provider and apprentice.
- Good practice to carry out mock Q&A sessions with apprentice.
- Audio WT can be effective but must be carefully planned.
- Ensure the witness testimony covers all the criteria.
- It is the providers responsibility to check the WT meets the required criteria for the observation.
- The witness testimony should cover **ALL** of the pass (**AND** distinction criteria **if possible**)
- The witness testimony must showcase the apprentice's skills.
- The Q&A which follows, lasts a maximum of 30 minutes.



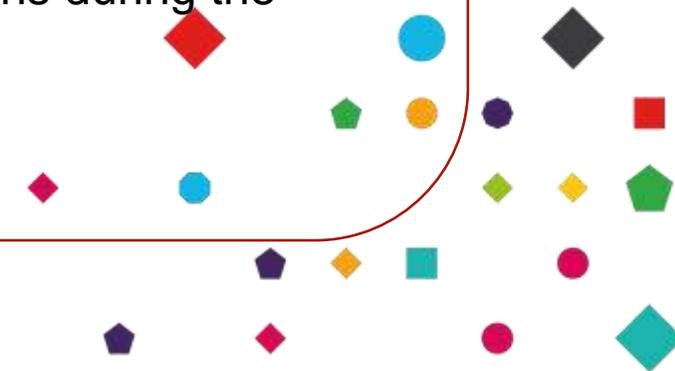
# LIEPA Feedback

## Witness testimony dispensation (with Q&As)



### Witness requirements:

- Please note, this method of assessment is a **direct replacement** for the observation.
- State their, name, job title, position, relationship to the apprentice (**often missing**).
- The witness must work in a role equivalent to first line management of the apprentice, or above, eg: Team Leader. Using the term 'colleague' is insufficient. You need to state how the person had responsibility for the apprentice.
- The witness must have worked with the apprentice for a minimum of 3 months during the course of their apprenticeship (**dates often missing**).



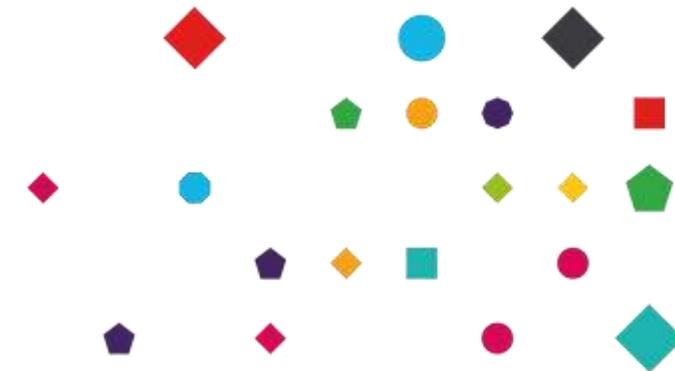
# LIEPA Feedback

## Witness testimony dispensation (with Q&As)



### Witness requirements:

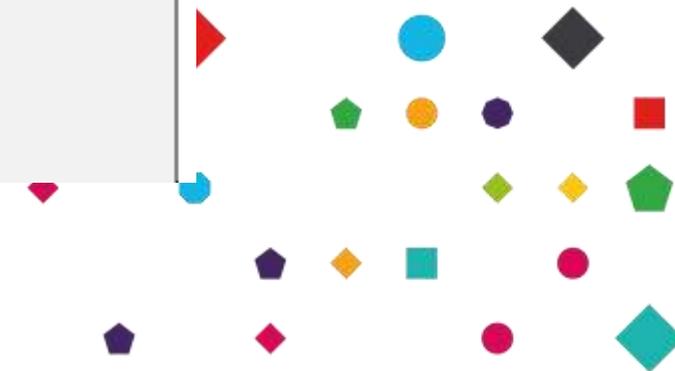
- Evidence must be generated on programme.
- Must include approximate dates (month and year).
- Clear examples of direct observation where the apprentice has demonstrated competency against the standard whilst on programme.



## Level 3 Customer Service Specialist

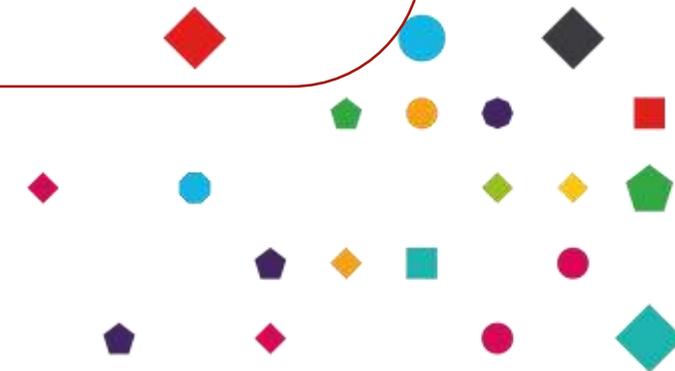
### Assessment 703/753 Practical observation (with Q&As) grade descriptors table

Standard module	City & Guilds Ref	Assessment requirement	Pass descriptors	Distinction descriptors
Knowing your customers and their needs/customer insight	OB1	How to analyse, use and present a range of information to provide customer insight	Demonstrates how they analyse, use and present a range of information in order to provide customer insight	N/A
	OB2	Understand different customer types and the role of emotions in bringing about a successful outcome	An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.	
			Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.	
OB3	Understand how customer expectations can differ between cultures, ages and social profiles	Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.		
Customer service culture and environment awareness	OB4	Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers	Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.	N/A



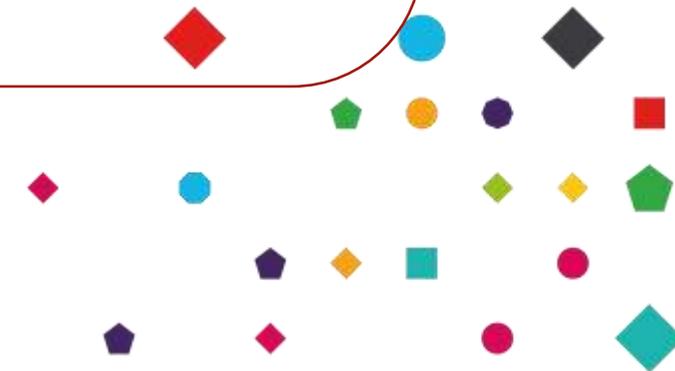
# Key Criteria – Practical Observation & WT Q&A

- **OB1** - How to analyse, use and present a range of information to provide customer insight.
- **OB3** - Understand how customer expectations can differ between cultures, ages and social profiles.
- **OB4** - Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers.
- **OB10** - Identify where highs and lows of the customer journey produce a range of emotions in the customer.

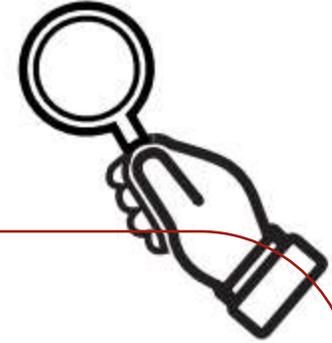


# Key Criteria – Practical Observation & WT Q&A

- **OB5** - Resolve complex issues by being able to choose from and successfully apply a wide range of approaches.
- **OB8** - Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy.
- **OB13** - When managing referrals or escalations take into account historical interactions and challenges to determine next steps.



# Witness testimony dispensation (with Q&As)



For further information.....

A screenshot of the City &amp; Guilds website. The page is titled "Updates and webinars" under the "Business Skills" category. It features a search bar at the top, a navigation menu, and several sections: "Upcoming webinars" with a link to a September 2020 webinar, "Updates" with links to July and June 2020 updates, "Past webinar events" with links to a COVID-19 assessment webinar and a practitioner showcase, and "Newsletters" with links to September 2020, March 2019, and May 2018 newsletters. A sidebar on the right lists "DIGITAL AND IT" categories like "Essential digital skills qualifications" and "Updates and webinars".

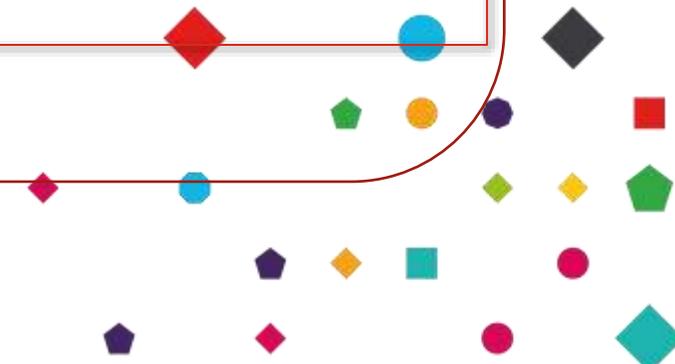
## Updates

[Medical Administration qualifications update July 2020 \(PDF\)](#)

[Customer Service Witness Testimony dispensation update \(YouTube\)](#)

[Medical Administration qualifications update June 2020 \(PDF\)](#)

<https://www.cityandguilds.com/qualifications-and-apprenticeships/business-skills/updates-and-webinars>



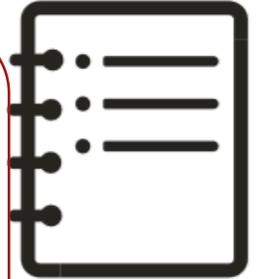
# Questions answers

# Work based project with interview

# Work based project supported by interview - Timeline

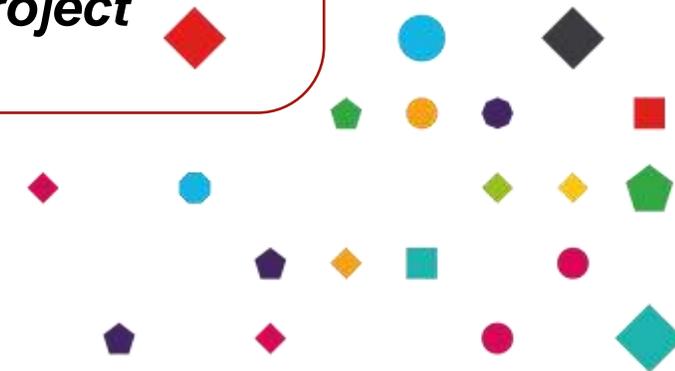
## Throughout the apprenticeship

- *Discuss / review possible areas of customer service provision that could be the basis for the project.*
- *Common areas of customer service failure*



## Gateway

- *Project proposal required (500 words).*
- *Submitted on the up to date project proposal form.*
- ***Proposal is approved and signed.***
- ***NB: The time frame of 2 months does not start until the project proposal is accepted***

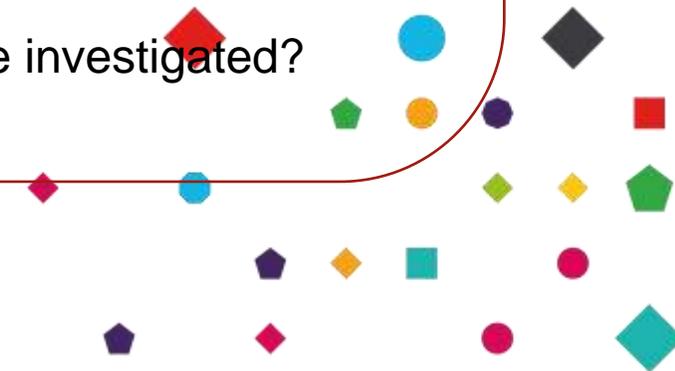


# Choosing the project topic



It is important that centres support apprentices to consider the following questions.

- Will the project allow the apprentice to meet the requirements of the Knowledge and Skills in the apprenticeship standard being assessed?
- What will be the impact of the project on internal and external customers?
- Can meaningful research be gathered to support the project?
- Is the project realistic? Is the project too big/too small? Could the recommendations from the project be implemented?
- Consider areas of service failure, why is this happening and could this be investigated?





# Work based project proposal



Compile proposal using grade descriptor table to support planning and check for coverage.

Apprentice Name	Apprentice 1	Enrolment number	ABC1234
<b>Improving the customer service experience for customers accessing pet treatment services at the Hill View Veterinary Practice</b>			
<i>Note: Please ensure that this is a maximum of 500 words</i>			
<p><u>Improving the customer service experience for customers accessing pet treatment services at the Hill View Veterinary Practice</u></p> <p>The objective of the project is to identify if improvements can be made to the quality and speed of customer service given to different customer groups based on a customer complaint received due to the miscommunication of a diagnosis of a customer's pet and the subsequent bill that was charged. (WB2,WB13)</p> <p>I will develop a questionnaire which customers will complete in writing or electronically (using an iPad in our reception area). Customers will be asked to rate and comment on their customer service experience with focus on communication of diagnosis, cost of treatment and suggest recommendations for improvement. I will create a spreadsheet to enter the results of the questionnaires. (WB3,WB4,WB8,WB12)</p> <p>I will also interview staff to gather their opinions on potential customer service improvements. I will create posters to inform customers a survey is being delivered to customers visiting out veterinary surgery. (WB3, WB4,WB6,WB7,WB12)</p> <p>A detailed analysis of the following data will take place to support and inform my recommendations going forward:</p> <ul style="list-style-type: none"> <li>- The customer's complaint including:             <ul style="list-style-type: none"> <li>o the customer's journey (WB4,WB9)</li> <li>o factors involved in the cause service failure (I.T errors, staffing) (WB5,WB9,)</li> <li>o the role each department played (WB7,WB12)</li> </ul> </li> <li>- Current process and procedure for dealing with complaints (WB1,WB5)</li> </ul>			

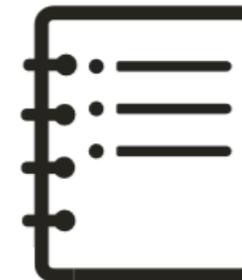
## Level 3 Customer Service Specialist

### Assessment 702/752 Work based project interview grade descriptors table

Standard module	City & Guilds Ref	Assessment requirement	Pass descriptors	Distinction descriptors
Business knowledge and understanding	WB1	Understand your organisation's current business strategy in relation to customers and make recommendation for its future.	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.	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.  Ability to consider the possible impact on their organisation of not considering the future in decision-making.
	WB2	Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation	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.  Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.	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.
	WB3	Understand the principles and benefits of being able to think about the future when taking action or making service related decisions	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.	Ability to consider the possible impact on their organisation of not considering the future in decision-making.



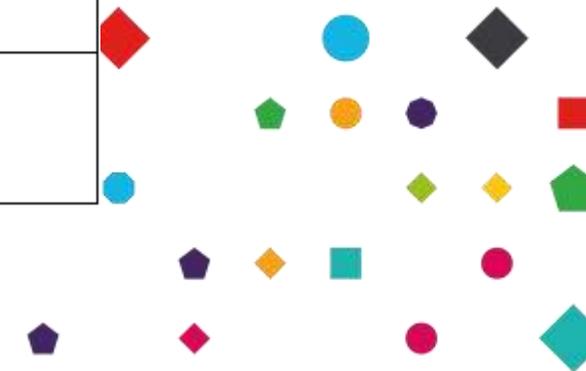
# Work based project proposal



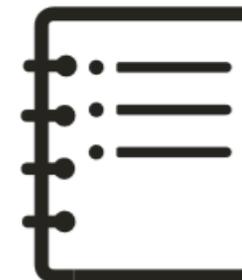
## Work based project planning checklist

You may want to use this checklist together with your employer to support the planning of your work based project. The checklist can also be used once your project is complete to ensure it includes the evidence / annexes that will meet the relevant criteria from the standard:

Standard Module & Pass Descriptor	City & Guilds Ref	Does my work based project have evidence of this?			Potential evidence / annexes
		Yes	No	Not sure	
<b>Business knowledge and understanding</b>					
Understand your organisation's current business strategy in relation to customers and make recommendation for its future.	WB1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation	WB2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Understand the principles and benefits of being able to think about the future when taking action or making service related decisions	WB3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	



# Work based project proposal – IEPA Feedback

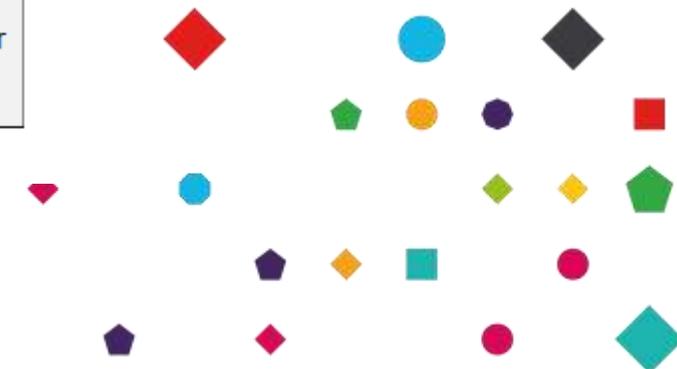


The table below is for IEPAs use only

Standard module	City & Guilds Ref	Assessment requirement	Does the work based project proposal have scope to evidence this?		IEPA comments
			Yes	No	
Business knowledge and understanding	WB1	Understand your organisation's current business strategy in relation to customers and make recommendation for its future.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	The recommendations for the future need to be based on the results from the project. An understanding of the organisation's current business strategy in relation to customers also needs to be demonstrated.
	WB2	Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The project proposal needs to make clear how the recommendations for change impact the organisation.
	WB3	Understand the principles and benefits of being able to think about the future when taking action or making service related decisions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	An understanding must also be shown of the underpinning business processes that support them in bringing about the best outcome for customers and the organisation.

Feedback will be sent supported by the Assessment requirements table.

IEPA comments will provide feedback where areas of the proposal does not provide full coverage.



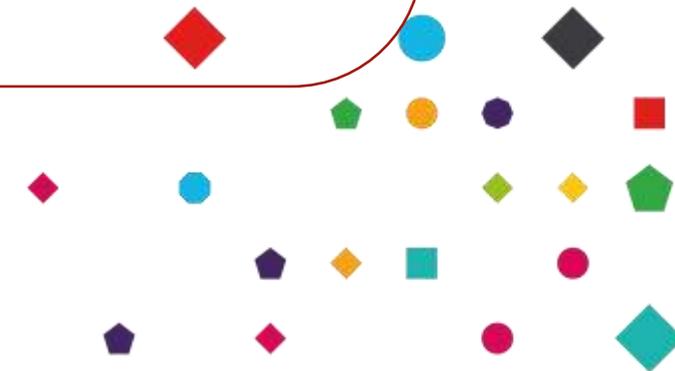
# Key Criteria – Work based project

- **Business Knowledge and understanding**

- Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.

- **Customer journey knowledge**

- Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience.



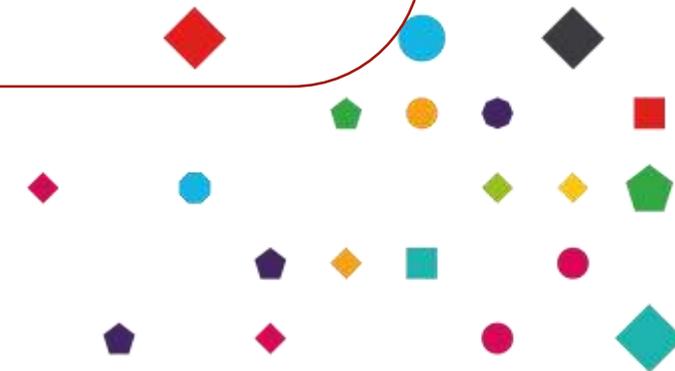
# Key Criteria – Work based project

- **Providing a positive customer experience**

- Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction.

- **Working with your customers / customer insight**

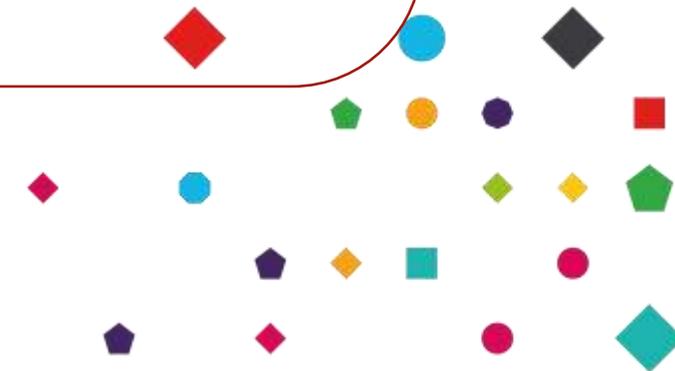
- Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it.
- Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service.



# Key Criteria – Work based project

- **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.



# Work based project supported by interview - Timeline

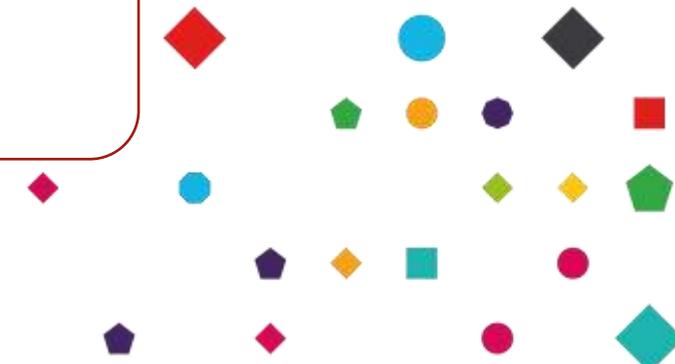
**IEPA approves project proposal**

**Carry out the project**

- *8 weeks maximum to complete the project and compile report.*

**Submit project report**

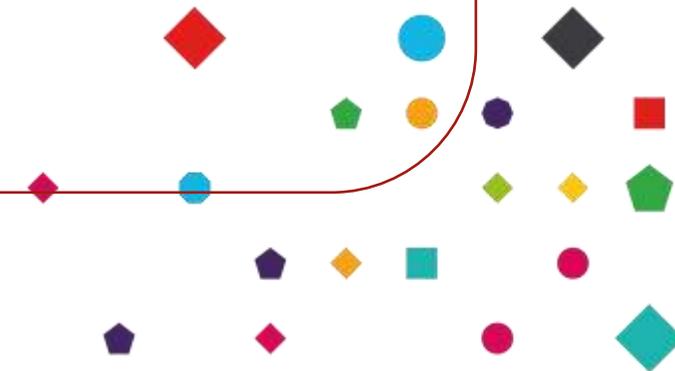
- *Submit 2 weeks prior to EPA*
- *Final report on project to be 2500 words (10% tolerance)*



# Case Study

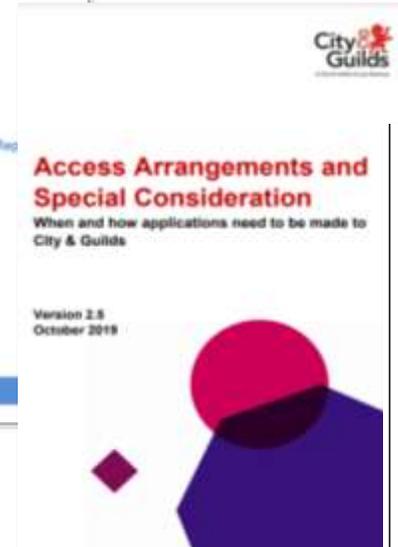
## Project Title – Investigation into the reasons behind poor performance within the customer complaints team

- The apprentice had noticed a reoccurring issue of low scores on call times within staff PDRs.
- Majority of the project was investigating this area of service failure.
- Gathering internal and external customer feedback.
- Sampling recorded calls.
- Annexes supporting the project included analysis of the data and the findings.
  - Poor compliance with ID checks.
  - IT and technical issues.
  - Insufficient equipment for those working remotely.
  - Large amounts of new staff.
- Resulted in 6 suggestions for improvement and implementation.
  - DPA / GDPR standardisation and training for staff.
  - Review of IT equipment.
  - Introduction of Quality Monitoring role.



# Resources available

- SmartScreen
- Enhanced SmartScreen
- Get to Gateway
- Apprenticeship Training Manual
- Exemplar Materials
- Skills Scans
- LIEPA reports
- [Recorded webinars](#)
- [Email updates](#)
- [Special dispensation applications](#)



# EPA Pro Support Materials

A City & Guilds Group Collaboration

## Dashboard

### Support Materials

718 unread

- View
- Welcome pack
- Checklists
- EPA Preparation Resources
- EPA pack
- Recording forms
- Sample tests
- LIEPA reports
- Exemplar materials
- EPA handbook
- Useful Links
- Sample synoptic project
- Gateway Support
- Synoptic project packs

#### Latest News

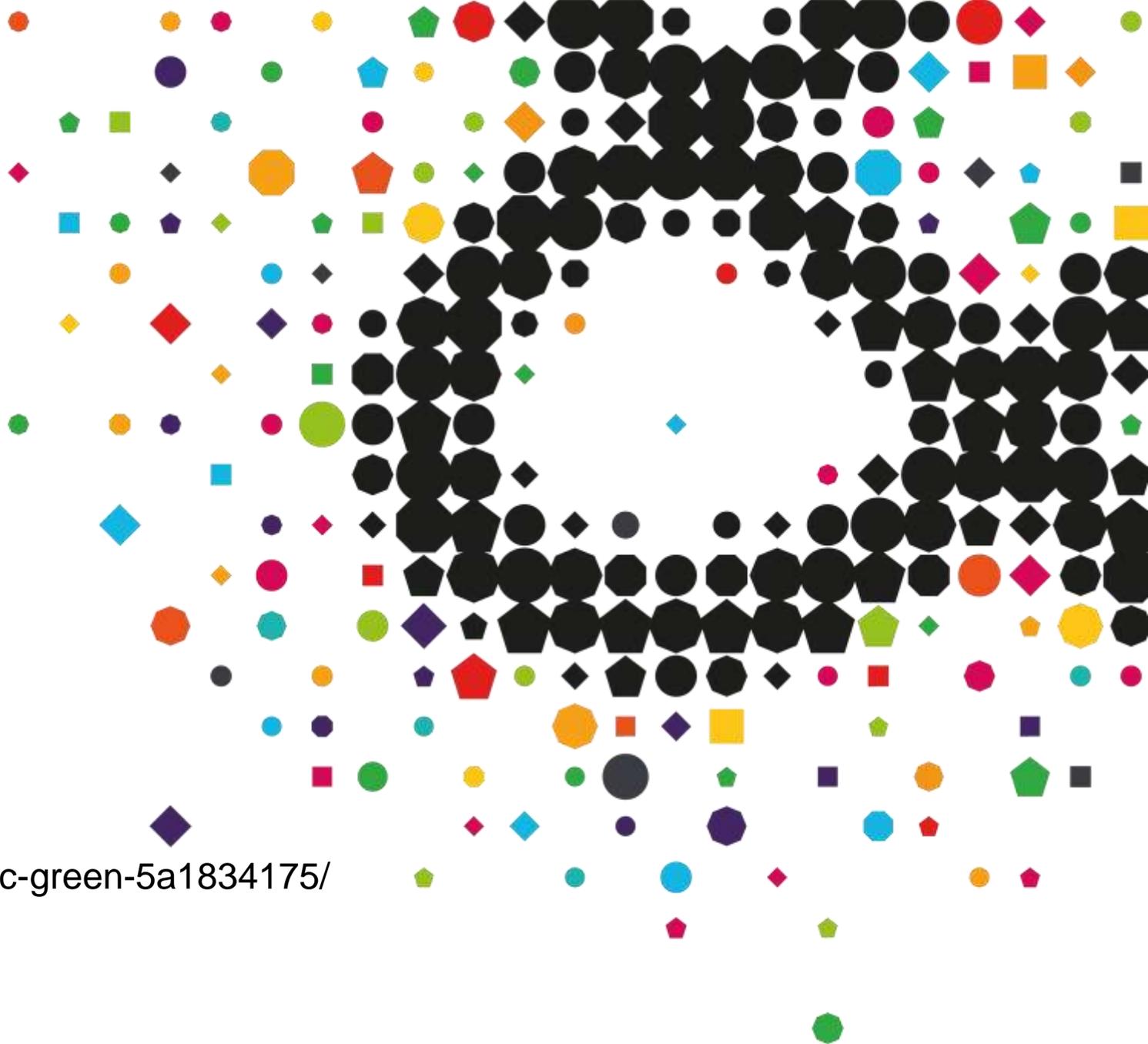
##### New EPA Pro release is now live

by Lorna Tyrntania | 1st Mar 2021

The latest release of functionality in EPA Pro is now live, check out the release notes link under Support Materials/ Useful links to learn more.

# Questions answers

# Thank you



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