

Level 3 Customer Service Specialist

Assessment 703/753 - Practical observation

Employer Witness Testimony to confirm competency

Guidance Document

This document includes information and guidance on completing the Witness Testimony to confirm the apprentice's competency against the standard covered by the observation.

Section 1

Witness Requirements:

- The witness must work in a role equivalent to first line management of the apprentice, or above, eg: Team Leader, Supervisor, and Manager.
- The witness must have worked with the apprentice for a minimum of 3 months during the course of their apprenticeship.
- The witness must state their name, job title, position and relationship to the apprentice.
- Provide work-based examples where the apprentice has demonstrated competency against the standard.

Section 2

Providing work-based examples against the standard:

- Provide two dated (month and year) examples of how the apprentice has demonstrated practical competency against the standard. The exception to this is *OB2 – Knowing your customer and their needs / customer insight* where three examples are required.
- The examples they provide must attest to the criteria. Both the pass and distinction criteria have been listed to allow the witness to provide examples that encompass both the pass and distinction criteria.
- The witness testimony can be submitted in an audio format in place of a written testimony. Guidance has been provided below as to how the witness is to record the audio testimony.
- The testimony provides the opportunity for examples to map holistically across the standard. It may be one example could cover criteria from multiple modules across the standard, and you are encouraged to provide quality examples that could cover more than one area of the standard eg: One example could cover both the Positive customer experience and Customer service performance.
- Record where one example maps to other areas of the standard in the relevant box.
- There are no word count requirements/restrictions; the focus of the examples should be to cover the cover the relevant Knowledge, Skills & Behaviours.

Completed Example:

The example here shows one of the three examples required to meet the pass criteria for OB2, and also cross referenced to the Business focused delivery and Providing a positive customer experience module:

Section 2			
Knowing your customers and their needs/customer insight			
OB2 - Understand different customer types and the role of emotions in bringing about a successful outcome			
Please provide THREE specific examples of how and when the apprentice has demonstrated competency against the criteria;			
OB2 – (Pass Criteria) The apprentice demonstrated the ability to assess at least *3 different customer types and their role of emotions in order to achieve a successful outcome for them.			
The apprentice demonstrated the ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.			
(* Customer types is defined as three customers who all have varying needs)			
Example 1			
<i>They demonstrated this by dealing with an elderly customer on the phone who had a query with their insurance policy. The apprentice answered the call professionally and after a series of open questions quickly established the customer had specific needs. The customer had difficulty expressing their query about the claim and was clearly upset. The apprentice recognised this, and also that the customer had difficulty with their hearing and adapted their approach by using an empathetic tone and clear language, that suited their customer's needs. This was achieved by using phrases such as "I can hear that you are upset about this Mr Smith, let's begin by taking some details and I will try my best to help you". The apprentice actively listened to the customer's query about their claim that had initially been refused due to missing information and used appropriate tone, pitch and pace to explain the reasons why and alternative options available to them. The apprentice skilfully obtained the missing information by using very clear questions, without patronising the customer, and was then able to confirm a the claim had been processed and achieved a successful outcome for the customer.</i>			
Date the above example(s) took place:	February 2020		
Cross references to module:	Business Focused Delivery	Criteria:	OB6
	Providing a positive customer experience		OB10

Providing an Audio Witness Testimony:

- Ensure the recording includes the date, witness' name, position, and relationship to the apprentice at the start of the recording.
- A clear indication of the module that the example is referring to.
- The example is clearly time stamped within the relevant module on the Witness Testimony Form.
- The example is cross referenced to other modules where appropriate using the cross referencing box.

Completed Example:

Providing a positive customer experience <i>OB8 - Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy</i>			
Please provide TWO specific examples of how and when the apprentice has demonstrated competency against the criteria;			
OB8 – (Pass Criteria) The apprentice demonstrated management of challenging and complicated situations, balancing organisational needs and customer satisfaction.			
OB8 – (Distinction Criteria) The apprentice demonstrated when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.			
 Example 1 Time on Recording: 10 minutes 30 seconds Example 2 They demonstrated this by..... Time on Recording: 12 minutes 40 seconds			
Date the above example(s) took place:	December 2019		
Cross references to module:	Positive Customer Experience	Criteria:	OB9 & OB11

Preparing the Apprentice for the Q&A Assessment:

There are two parts to the Witness Testimony Q&A assessment.

Part 1

The first part of the Q&A assessment will be based on the following four pass criteria.

Knowing your customers and their needs/customer insight

OB1 - *The apprentice demonstrates how they analyse, use and present a range of information in order to provide customer insight.*

OB3 – *The apprentice evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.*

Customer service culture and environment awareness

OB4 – *The apprentice demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.*

Providing a positive customer experience

OB10 – *The apprentice is able to recognise when customer emotions have been affected by the level of service offered.*

Because of the nature of these criteria that are primarily knowledge based, and unlikely to happen practically / be witnessed, they will form the first part of the assessment and are mandatory questions that will be asked of the apprentice.

Apprentices might bring evidence to support these criteria with them to the Q&A Assessment and refer to it when answering the questions to support and illustrate their responses.

Part 2

During the second part of the Q&A assessment the IEPA will ask the apprentice questions on the examples provided within the Witness Testimony.

Section 3

Employer Declaration

- The witness must ensure the examples included are a true and accurate account of real work-based examples.
- Both the witness and the apprentice must sign and date the witness testimony.
- The apprentice has been involved and is familiar with the selection of the examples that have been included.

Completed Example:

Section 3			
Employer / Witness Declaration			
I can confirm that:			
<ul style="list-style-type: none">• The examples provided within this witness testimony are a true and accurate account of real work-based examples. The apprentice has been observed carrying out work based activities where they have shown practical competency against the standard.			
Witness Signature	<i>Team Leader 1</i>	Date	April 2020
Apprentice Declaration			
I confirm that:			
<ul style="list-style-type: none">• The examples provided within this witness testimony are accurate and based on real-work based examples where I have practically demonstrated competency against the standard.• I have read the details of the examples included in preparation for a Witness Testimony Discussion which will take place during my End-point Assessment.• I understand that the details of the examples included will be explored further by the Independent End-point Assessor during the Witness Testimony Q&A.			
Apprentice Signature	<i>Apprentice 1</i>	Date	April 2020

Customer Service Specialist Supporting Information:

End-point Assessment Pack for Centres/ End-point Assessment Customers:

<https://www.cityandguilds.com/qualifications-and-apprenticeships/business-skills/customer-service-and-contact-centre/9494-level-3-customer-service-specialist-endpoint-assessment#tab=documents>

*Passwords can be obtained from Walled Garden

Level 3 Customer Service Specialist Assessment Plan:

https://www.instituteforapprenticeships.org/media/1777/st0071_customer-service-specialist_l3_ap-for-publication_15052018.pdf

Customer Support:

If you require further help or support please contact:

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Telephone: 0844 543 0000

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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
Business focused service delivery	OB5	Resolve complex issues by being able to choose from and successfully apply a wide range of approaches	Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.	N/A
	OB6	Find solutions that meet your organisation's needs as well as the customer requirements	An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.	Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.
Providing a positive customer experience	OB7	Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes	Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.	Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.
	OB8	Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy	Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction.	Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.
	OB9	Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps	An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.	Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.

	OB10	Identify where highs and lows of the customer journey produce a range of emotions in the customer	Recognises when customer emotions have been affected by the level of service offered.	N/A
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	OB11	Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format	Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.	N/A
Customer service performance	OB12	Maintain a positive relationship even when you are unable to deliver the customer's expected outcome	Evidences when they have maintained a positive relationship even when they are unable to deliver the customer's expected outcome.	N/A
			Evidences how they recognise when customer expectations are not met and demonstrates how, using appropriate communication techniques, this could be managed to maintain a positive relationship.	
	OB13	When managing referrals or escalations take into account historical interactions and challenges to determine next steps	Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.	
Ownership / Responsibility	OB14	Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation	Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures.	N/A

	OB15	Exercises proactivity and creativity when identifying solutions to customer and organisational issues	Shows proactivity and creativity when identifying solutions to customer and organisational issues.	N/A
Team working	OB16	Work effectively and collaboratively with colleagues at all levels to achieve results	Demonstrates achievement of results through effective team work and collaboration with colleagues at all levels.	N/A
	OB17	Recognise colleagues as internal customers	Shows adaptability of own skills when working with internal customers.	
Equality	OB18	Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer	Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.	N/A
	OB19	Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment	Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.	
Presentation	OB20	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.	N/A

	OB21	Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand	Evidence to show how their personal presentation made a positive impact on their organisation's brand.	N/A
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