

City & Guilds Level 2 End-point Assessment for Customer Service Practitioner (9794-12)

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End-point Assessment Pack

For Centres/ End-point Assessment Customers

Version and date	Change detail	Section
3.0 January 2020 EPA PRO	'Gateway – prior to End-point Assessment' amended for EPA Pro.	3
	'End assessment timeline - After 12 month period – Gateway process' amended for EPA Pro.	5
August 2020 Version 3.1 EPA PRO	Feedback guidance updated	Section 3
	Added reference to IfATE on opportunities to retake/resit for EPA; Added clarifications on resit for apprentice showcase supported by interview, practical observation and professional discussion; Determining the apprenticeship grade table updated.	Section 3
	Removed third option on old portfolio format;	Section 5
	Added note on submission of a fully completed showcase evidence reference form; Added minimum requirement for showcase evidence;	Section 5
	Reduce maximum word count for showcase (report) to 3500 words	Section 5
	Changed minimum duration of professional discussion to 30 minutes	Section 5
	Added note on showcase not being allowed during the professional discussion	Section 5
	City & Guilds address updated	Last page
August 2020 Version 3.2 EPA PRO	Deleted sentence on showcase	Professional discussion – instructions for apprentice (page 59)

Version and date	Change detail	Section
March 2021 Version 3.3 EPA PRO	Amended guidance - apprentices are allowed to have the showcase with them during the professional discussion; Added reference to guidance on how to put together a PDP available within the End-point Assessment Recording Forms for Centres/End-point Assessment Customers document, together with a PDP template.	Section 5
September 2023 v3.4	Clarified guidance on requirements to enable IEPA to proceed with review of showcase.	701/751 Apprentice showcase
September 2023 v3.5	Created v3.5 so same version is uploaded to EPA pro and website.	Front cover
March 2024 v3.6	Added note 'If you wish to have your showcase portfolio and any supporting notes during the EPA you may print a hard copy in advance.'	Professional Discussion (page 60)
August 2025 v3.7	Title amended Removed arrows in grading descriptors table for Apprentice Showcase (with interview) Amended maths and English gateway requirements KSBs corrected in specification for showcase and professional discussion	Cover Apprentice Showcase (with interview) page 31-50 Gateway page 9 Assessment specifications page 17 and 59
February 2026 v3.8	Added sentence for Practical Observation Resit/retake: 'At the conclusion of the practical observation resit/retake in the event of any outstanding gaps the IEPA will have the opportunity to ask questions to the apprentice to address those areas of the standard which were not evidenced during the observation. The questioning must be completed within a maximum of 30 minutes.'	Page 14

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1 Introduction

About this Apprenticeship Occupation

The role of a customer service practitioner is to deliver high quality products and services to the customers of their organisation. Your core responsibility will be to provide a high quality service to customers which will be delivered from the workplace, digitally, or through going out into the customer's own locality. These may be one-off or routine contacts and include dealing with orders, payments, offering advice, guidance and support, meet-and-greet, sales, fixing problems, after care, service recovery or gaining insight through measuring customer satisfaction. You may be the first point of contact and work in any sector or organisation type.

Your actions will influence the customer experience and their satisfaction with your organisation. You will demonstrate excellent customer service skills and behaviours as well as product and/or service knowledge when delivering to your customers. You provide service in line with the organisation's customer service standards and strategy and within appropriate regulatory requirements. Your customer interactions may cover a wide range of situations and can include; face-to-face, telephone, post, email, text and social media. Completion of this apprenticeship will lead to eligibility to join the Institute of Customer Service as an Individual member at Professional level.

What is in this document

- The occupation standard
- Resource requirements for End-point Assessment
- Timeline for End-point Assessment
- End-point Assessment tasks and guidance on grading

This document must be used alongside the **End-point Assessment Recording Forms for Centres / End-Point Assessment Customers** document.

2 Standard – Customer Service Practitioner

Knowledge	What is required
Knowing your customers	<ul style="list-style-type: none"> • Understand who customers are. • Understand the difference between internal and external customers. • 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.
Understanding the organisation	<ul style="list-style-type: none"> • Know the purpose of the business and what 'brand promise' means. • Know your organisation's core values and how they link to the service culture. • Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation.
Meeting regulations and legislation	<ul style="list-style-type: none"> • Know the appropriate legislation and regulatory requirements that affect your business. • Know your responsibility in relation to this and how to apply it when delivering service.
Systems and resources	<ul style="list-style-type: none"> • Know how to use systems, equipment and technology to meet the needs of your customers. • Understand types of measurement and evaluation tools available to monitor customer service levels.
Your role and responsibility	<ul style="list-style-type: none"> • Understand your role and responsibility within your organisation and the impact of your actions on others. • Know the targets and goals you need to deliver against.
Customer experience	<ul style="list-style-type: none"> • Understand how establishing the facts enable you to create a customer focused experience and appropriate response. • Understand how to build trust with a customer and why this is important.
Product and service knowledge	<ul style="list-style-type: none"> • Understand the products or services that are available from your organisation and keep up-to-date.
Skills	What is required
Interpersonal skills	<ul style="list-style-type: none"> • Use a range of questioning skills, including listening and responding in a way that builds rapport, determines

Skills	What is required
Communication	<p>customer needs and expectations and achieves positive engagement and delivery.</p> <ul style="list-style-type: none"> • Depending on your job role and work environment: <ul style="list-style-type: none"> ○ Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or <ul style="list-style-type: none"> ○ Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions. • Use an appropriate ‘tone of voice’ in all communications, including written and digital, that reflect the organisation’s brand.
Influencing skills	<ul style="list-style-type: none"> • Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation.
Personal organisation	<ul style="list-style-type: none"> • Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines.
Dealing with customer conflict and challenge	<ul style="list-style-type: none"> • Demonstrate patience and calmness. • Show you understand the customer’s point of view. • Use appropriate sign-posting or resolution to meet your customers needs and manage expectations. • Maintain informative communication during service recovery.

Behaviours/Attitude	What is required
Developing self	<ul style="list-style-type: none"> • Take ownership for keeping your service knowledge and skills up-to-date. • Consider personal goals and propose development that would help achieve them.
Being open to feedback	<ul style="list-style-type: none"> • Act on and seek feedback from others to develop or maintain personal service skills and knowledge.
Team working	<ul style="list-style-type: none"> • Frequently and consistently communicate and work with others in the interest of helping customers efficiently. • Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice
Equality – treating all customers as individuals	<ul style="list-style-type: none"> • Treat customers as individuals to provide a personalised customer service experience. • Uphold the organisations core values and service culture through your actions.

Behaviours/Attitude	What is required
Presentation – dress code, professional language	<ul style="list-style-type: none"> • Demonstrate personal pride in the job through appropriate dress and positive and confident language.
'Right first time'	<ul style="list-style-type: none"> • Use communication behaviours that establish clearly what each customer requires and manage their expectations. • Take ownership from the first contact and then take responsibility for fulfilling your promise.

3 End-point Assessment guidance for Independent Assessors

End-point Assessments

Apprentices are expected to achieve a number of End-point Assessments (EPAs) to conclude their apprenticeship. All EPAs are formal summative assessments that conclude the apprenticeship programme. The Level 2 Customer Service Practitioner apprenticeship is assessed in a number of ways to provide a clear indication of the apprentice's knowledge and skills. For this apprenticeship the following assessment methods need to be achieved:

- Apprentice showcase (supported with interview)
- practical observation
- professional discussion

The focus of the EPA is for the apprentice to fully demonstrate the knowledge, skills and behaviours/attitudes set out in the apprenticeship standard and to be able to demonstrate this level of professional competence in authentic workplace contexts.

Entry requirements for End-point Assessment

To be eligible for End-Point Assessment the apprentice must have successfully achieved the following:

- a minimum of 12 months of employment
- English and mathematics qualifications in line with the apprenticeship funding rules

Gateway – prior to End-point Assessment

The Gateway process is designed to provide an opportunity for the employer/tutor to review progress of the apprentice and confirm that they are eligible for carrying out end-point assessment. The employer/tutor will review the apprentice's achievements to date, ensuring that all entry requirements have been met and that the apprentice is proficient in all areas of the standard.

On completion of the Gateway process, the apprentice will be required to sign an **Apprentice Gateway Declaration Form**. This form should be submitted as part of the Gateway process in EPA Pro. A copy of this form can be found in the Support Resources section on EPA Pro. The provider will be required to make a declaration and electronic signature on behalf of the employer and provider/tutor in EPA Pro.

Types of tasks

A range of assessment methods have been set to assess an apprenticeship; these include the following:

Oral Assessments

There are different types of oral assessment that may be specified to assess part of an apprenticeship. Oral Assessments have often been selected because they provide an IEPA a good opportunity to explore or reaffirm information that may not have been readily evident from another assessment method, to validate and probe for aspects of skill, knowledge and behaviour as well as offering an opportunity to explore authenticity. The oral assessment method used in this apprenticeship is professional discussion and showcase interview.

A professional discussion is best classed as a structured conversation which explores agreed and pre- identified areas with an apprentice, typically based on reviewing evidence.

Showcase

Unlike a more traditional portfolio of evidence which often includes multiple pieces of evidence against the same criteria, showing multiple examples over a period of time, a showcase should be a much smaller collection of evidence that has been constructed to show the best examples of what an apprentice can do against a set of specified criteria. The apprentice will compile a portfolio of evidence of work during their apprenticeship, successfully demonstrating the required knowledge, skills and behaviours/attitude. They will then select the 'best' evidence from their portfolio to demonstrate the minimum requirements of the standard at the final stage of the programme as an 'apprentice showcase', which attests to professional competence at the level.

Practical tasks

Practical assessment tasks are set to enable apprentices to demonstrate their practical skills. Most practical tasks will be assessed through direct observation of the apprentice carrying out the tasks and/or an assessment of the final outcome/product.

Introducing EPA to the apprentice

The delivery of all end-point assessment components is governed by the IEPA. A realistic timeframe should be set for completion of each task.

Apprentices should be able to negotiate deadlines where they have a good reason for the request, but reliability and punctuality are watchwords of employment and centres will refer to their own centre policy when dealing with late submissions where no good reason is provided.

Health and safety / Codes of practice

The importance of safe working practices, the demands of the Health and Safety at Work Act and the Codes of Practice associated with the industry **must** always be adhered to.

The requirement to follow safe working practices is an integral part of all City & Guilds assessments, and it is the responsibility of training provider/employer to ensure that all relevant health and safety requirements are in place before apprentices begin any practical assessment.

Should an apprentice fail to follow correct health and safety practices and procedures during EPA and/or are putting themselves, customer or other staff members at risk, the assessment **must be stopped** by the IEPA and the apprentice advised of the reasons why. The apprentice should be informed that they have not reached the standard of assessment required. It is at the discretion of the Independent End-point Assessor (IEPA) to confirm whether the EPA can restart.

Authenticating the apprentice's work

When making judgements on evidence of unobserved tasks, the independent end-point assessor must ensure all decision satisfy VACS – **that the evidence is Valid, Authentic, Current and Sufficient**. For evidence produced outside controlled conditions the apprentice will be required to:

- sign a declaration that the work is their own
- reference all sources.

For further information on authenticating work, see: www.ofqual.gov.uk/plagiarism-teachers

City & Guilds have produced evidence reference forms that include a declaration of authenticity form, these must be completed when submitting evidence and can be found in the **EPA recording forms for End-Point Assessment customers/employers** document. These should be completed and signed by both the tutor/employer and the apprentice.

Recording forms

City & Guilds have designed specific recording forms for apprentices and centres / End-point Assessment customers / employers to use for this apprenticeship.

These can be found in **End-point Assessment Recording Forms for Centres / End-point Assessment Customers** document. Centres must use the forms provided by City & Guilds in the format laid out in this document.

Notes on the grading criteria

Each assessment will be individually assessed and graded by a City & Guilds IEPA. The grade will be determined using the grading criteria detailed in the tasks.

Determining the apprenticeship grade

The IEPA will be responsible for grading for all EPA components and communicating these outcomes to City & Guilds for overall grading of the apprenticeship.

The overall grade for the apprenticeship will be determined based on the apprentice's achievement in each of the assessment components, and taking into account the assessments' weighting.

Each of the assessment methods has its own criteria.

To achieve a Pass in each assessment method, the apprentice must achieve all pass criteria (100%)

All assessments must be achieved at a minimum of pass for the apprenticeship to be achieved.

To achieve a **Distinction**, the apprentice must achieve everything at pass grade and achieve the minimum distinction criteria in **each** assessment method as follows:

Assessment method	Grade scale
Apprentice showcase (with interview) (701)	Pass: Must meet all pass criteria Distinction: Above + Must meet a minimum of 7 out of 10 distinction criteria
Practical observation (702)	Pass: Must meet all pass criteria Distinction: Above + Must meet a minimum of 4 out of 5 distinction criteria
Professional discussion (703)	Pass: Must meet all pass criteria Distinction: Above + Must meet a minimum of 3 out of 4 distinction criteria

Feedback

The IEPA will not provide any feedback to the apprentice during or immediately following the assessment components that make up the EPA. Feedback will be given to the provider for any apprentices who have taken EPA, following submission of evidence to City & Guilds and after any grade determination has been carried out

Results submission and Certification

The City & Guilds IEPA will submit the apprentice results to City & Guilds. City & Guilds will issue the End-point Assessment record of achievement confirming the grade achieved and will notify the appropriate body who will issue the apprenticeship certificate.

Opportunities to retake/resit for End-point Assessments

An apprentice who passes the EPA cannot re-sit to achieve a higher grade, as stated in section 7 of the Institute for Apprenticeships and Technical Education (IfATE) guidance on Developing and End-Point Assessment Plan)

If an apprentice fails any part of the EPA, they should not retake the EPA until they have completed a period of further learning or training and the EPA customer is confident the apprentice is competent. A separate EPA resit booking will need to be made with City & Guilds for the relevant assessment.

If an apprentice fails any part of the EPA for reasons out of their control, a resit can be booked at the earliest opportunity.

There is no limit on the number of times an apprentice can fail and retake/resit the EPA assessment methods for this standard.

Apprentice Showcase supported by interview

Apprentices who have failed the showcase will need to submit evidence against the previously **failed** criteria only. This could be a mixture of new evidence and evidence previously submitted. The full showcase should **not** be resubmitted.

Apprentices who have failed the showcase supported by interview will be required to submit the revised showcase **only**. New / revised evidence must be clearly referenced to make the assessment of the resit easier and quicker for the IEPA.

The showcase interview will **not** take place as part of the resit.

Practical observation and professional discussion

It should be noted that the practical observation and professional discussion are synoptic assessments therefore during a resit the apprentice will need to be able to demonstrate the **criteria** they previously **passed, not just** the **criteria** they **failed** during the original assessment.

At the conclusion of the practical observation resit/retake in the event of any outstanding gaps the IEPA will have the opportunity to ask questions to the apprentice to address those areas of the standard which were not evidenced during the observation. The questioning must be completed within a maximum of 30 minutes.

4 End-point Assessment Resources list

Resource required	
Practical observation	<p>The apprentice is observed during the course of their normal job role in their place of work.</p> <p>Apprentices will be required to be observed against:</p> <ul style="list-style-type: none"> • Interpersonal skills • Communication • Equality – treating all customers as individuals • Presentation – dress code, professional language • Right first time
Apprentice showcase interview; Professional discussion	A suitable quiet room, free from distraction, for the apprentice showcase interview and professional discussion to take place, large enough to accommodate all those involved.
	Seating area or room for any other apprentices to wait.
	Access to water and cups.
	Where applicable, internet access and suitable equipment for remote assessment as outlined in the manual for EPA services.

5 End assessment timeline

It is the responsibility of the training provider to ensure that the apprentice is ready for each stage of this timeline.

Time line	Activity
<p>Minimum of 12 month period on-programme</p>	<p>Customer (Employer/training provider):</p> <ul style="list-style-type: none"> reviews progress and ensures apprentice's performance is on track as part of the regular performance management system identifies any gaps and creates a plan for EPA with the apprentice considers whether the apprentice's potential evidence from the portfolio of evidence is appropriate and sufficient to meet the standard (scope and breadth). <p>Apprentice:</p> <ul style="list-style-type: none"> completes the English and maths components of the apprenticeship continue to work on the portfolio of evidence, reviewing and finalising the evidence to demonstrate the minimum requirements of the standard
<p>After 12 month period – Gateway process</p>	<p>The Apprentice and line manager/tutor review progress and confirm that the apprentice is ready for EPA.</p> <ul style="list-style-type: none"> All supporting evidence is uploaded into the EPA Pro platform through the Gateway process. The Apprentice signs the completed Apprentice Gateway Declaration Form and this is uploaded by the provider in the EPA Pro Gateway process. The provider completes a declaration and e-signature on behalf of the provider and employer in the EPA Pro platform
<p>Book EPA in line with City& Guilds booking timelines*</p>	<p>Apprentice:</p> <ul style="list-style-type: none"> provides selected evidence from their portfolio to form the apprentice showcase <p>Customer (Employer/training provider):</p> <ul style="list-style-type: none"> makes EPA booking with City & Guilds submits the apprentice showcase, either as written report or recorded audio presentation according to prescribed requirements to the EPA team two weeks prior to the EPA date.

Time line	Activity
Completion of assessment tasks	Apprentice assessed through showcase interview, practical observation and professional discussion.

* further information around City & Guilds booking process and timelines can be found in the Manual for the End-point Assessment Service.

Assessment 701/751 Apprentice Showcase (with interview)

Assessment specification

Assessment component	Description	Coverage	Grading
1	Showcase Portfolio (with Interview)	<p>Knowledge: Understand the organisation 1.1 – 1.3; 2.1 – 2.5; 3.1 – 3.5; Meeting regulations and legislation 1.1; 2.1- 2.4; Systems and resources 1.1 – 1.2; 2.1 – 2.2; Product and Service knowledge 1.1 – 1.3</p> <p>Skills: Influencing skills 1.1 – 1.4; Personal organisation 1.1 – 1.5; Dealing with customer conflict and challenge 2.1 – 2.3; 3.1, 4.1 –4.4; 5.1– 5.2</p> <p>Behaviours/Attitude: Developing self 1.1 – 1.2; 2.1 – 2.2; Being open to feedback 1.1 – 1.4; Team working 1.1 – 1.3; 2.1 – 2.2;</p>	P/D/X

Assessment 701/751 Apprentice Showcase (with interview)

Assessment Component 1: Instructions for centres / End-point Assessment customers

A portfolio of evidence of work will be compiled during the apprenticeship, demonstrating the required knowledge, skills and behaviours/attitude.

With guidance from the employer and/or training provider the apprentice must select appropriate evidence from their portfolio to demonstrate the minimum requirements of the standard, presented as an 'apprentice showcase' which attests to professional competence at the level. The apprentice will be interviewed by the IEPA and answer questions based on the evidence submitted.

The apprentice showcase needs to be submitted to the EPAO **two** weeks prior to the interview, which is likely to take place on the same day of the practical observation and professional discussion.

It is recommended that the apprentice submits the showcase electronically in **one** of the following formats:

- As a written report - typically between **3000 to 3500 words**, not including appendices.
or
- As a recorded audio presentation with bullet points/notes/presentation slides, including appendices. The audio recording typically would be between **30 to 45 minutes**.

The apprentice showcase must cover as a **minimum** the following:

'Knowledge of your organisation'

- Understand the organisation
 - the aims of the organisation in relation to its sector
 - what is meant by the organisation's 'brand promise'
 - how the organisation's core values relate to its service culture
 - the purpose of different organisational policies and procedures that affect their customer service role.
 - the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment
- Meeting regulations and legislation

- how the relevant legislation and regulations affect the organisation's customer service provision
- own responsibilities for keeping information confidential in the organisation
- the responsibilities of employees and employers under the Health and Safety at Work Act
- Systems and resources
 - the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively

'Day to day customer service activities'

- Product and Service knowledge
 - the difference between the features and benefits of products and/or services in relation to the organisation
- Influencing skills
 - offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation
 - communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs
 - handle customer objections in a positive and professional manner
- Dealing with customer conflict and challenge
 - maintain calm and patience at all times when dealing with challenging customer situations
 - demonstrate sensitivity to, and interest in, the customers' concerns
 - communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers
 - resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures
 - keep customers informed of progress while resolving issues
 - maintain accurate record of customer issues and progress to resolution
- Team working
 - work with others in a positive and productive manner
 - communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently
- Personal organisation
 - prioritise and plan the completion of tasks according to agreed deadlines

- use appropriate tools and techniques to monitor the progress of tasks completion
- Systems and resources
 - the measures and evaluation tools used in the organisation to monitor customer service levels

'Your self-assessment and personal development'

- Product and Service Knowledge
 - how to maintain their knowledge of the organisation's products and/or services
- Developing self
 - conduct a self-assessment to identify their strengths and weaknesses in relation to the job role
 - produce a personal development plan to support the achievement of their agreed learning and development goals
- Being open to feedback
 - seek constructive feedback about their customer service skills and knowledge from others
 - use feedback from others to develop their customer service skills and knowledge.
- Team working
 - share personal learning and information with others to support good customer service practice

Note: Please refer to the 'Apprentice showcase (with interview) grading criteria' for details of the distinction criteria.

Appendices are required to be submitted as part of the showcase.

Overview of the Appendices

The apprentice **must** include evidence of the following:

- demonstrating communication and influencing skills in customer service
- handling of customers in a variety of situations, resolving customer conflicts and/or challenging situations with associated records
- meeting deadlines including prioritising and planning the completion of tasks

- working with others including sharing personal learning and information
- reports or witness testimonies from sources such as mentors, managers, customers
- application of a self-assessment technique with possible feedback from others
- personal development plan(s) to support the achievement of agreed learning and development goals, with evidence of authentication.

The appendices may also include (but are not limited to) examples of work-based evidence covering relevant documents or screen shots relating to their customer service role, observations, customer feedback.

Guidance on submitting supporting evidence in a showcase

The supporting evidence for the apprentice showcase is a concise collection of the apprentice's best pieces of evidence selected from the breadth of available evidence. It efficiently demonstrates the apprentice's performance in relation to the specified criteria and showcases their highest quality work.

The apprentice should only provide evidence that is objectively pertinent to their showcase, and should resist appending high volumes of evidence. City & Guilds reserves the right not to continue with the assessment, where they deem the amount of evidence presented to be not relevant /excessive. In such circumstances, evidence will be returned without being reviewed and the centre/apprentice will be asked to revise the volume of material that has been submitted.

The supporting evidence should be placed into the appendix and directly referenced to the relevant section within the report or recorded audio presentation with bullet points/notes/ presentation slides.

The supporting evidence submitted in the appendix must also be referenced in the 'showcase evidence reference form' within the **End-point Assessment recording forms for Centres/ End-point Assessment customers** document.

Types of supporting evidence

The supporting evidence should be produced in electronic format, or scanned/ photographed to give a clear electronic representation, as it must be submitted electronically for EPA.

The supporting evidence in the showcase must be chosen to provide valid evidence for the specified criteria being assessed. It can be for example:

- Products – for instance
 - Electronic documents such as customers feedback, complaint logs, reports, emails or letters, survey, questionnaire, self- assessment etc
- Observation evidence – a statement from a suitably qualified person (eg tutor) describing the apprentice's performance in the workplace while carrying out naturally occurring activities.

- Witness testimony – evidence from a relevant witness giving their account of what the apprentice has done in their job role. The witness can range from a manager to a customer.

All supporting evidence must be of the apprentice's own work and, for any team work, must clarify and focus only on their contribution.

Where necessary, confidentiality and data protection requirements must be adhered to eg permissions for use of video/images containing identifiable 3rd parties (eg customers), anonymising of documentation and permissions obtained from customers when submitting documents relating to them.

Selecting the evidence

Before selecting the evidence to form the apprentice showcase, whether in the form of a written report or audio presentation with bullet points/notes/presentation slides, or supporting evidence in the appendix, the apprentice should review the assessment requirements stated in the standard as well as the following:

- the criteria to be covered by the showcase
- the type of supporting evidence that can be presented (see above)
- the minimum supporting evidence that should be presented
- the period of time from which the evidence should have originated (usually this will be towards the end of the apprenticeship), however some evidence such as self-assessment and performance review must be ongoing. Evidence collected towards the end of their apprenticeship programme, as they become independent in their work, is likely to provide the most holistic evidence – ie covering a number of criteria at once.

To assemble the showcase, the apprentice should consider all the evidence they have available that shows they have met the requirements being assessed. Apprentices should select evidence that **most efficiently** meets all the relevant criteria and which demonstrates their **best performance**. While there may be some overlap between the evidence collected, multiple pieces of evidence showing coverage of the same criteria should not normally be submitted for EPA, unless specified in the module(s) and grading criteria requirements eg Dealing with customer conflict and challenge – it is expected that there would be evidence of dealing with more than one customer.

There are two questions that an apprentice should consider when selecting work to form their showcase:

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 pass and distinction grade?

Confirming the evidence selection

When the apprentice has selected the evidence to form their showcase, this must be reviewed by the employer / training provider to ensure:

- all assessment requirements have been met;

- it is in line with any requirements relating to the type and amount of evidence required and when the evidence should have originated;
- there is no unnecessary duplication of evidence against the same criteria, unless specified in the in the module(s) and grading criteria requirements;
- the work selected represents the best evidence available in relation to the criteria requirements for the showcase portfolio;
- the clarity of any images or scanned evidence is sufficient to determine the quality of the original evidence;
- authenticity of evidence has been established.

Preparing evidence for submission

Evidence being uploaded for EPA must be presented as follows:

- each piece of evidence must have a header containing the name of the apprentice together with the date the evidence was produced and an evidence reference number. It is good practice, where possible, to add a handwritten/e-signature although this is not mandatory.
- each piece of evidence must be referenced to the criteria it is being submitted against on the 'showcase evidence reference form' (found in the **End-point Assessment recording forms for Centres/ End-point Assessment customers** document)

This is to ensure that each piece of evidence is cross-referenced to each relevant criterion.

Presenting the evidence in this way also formally confirms that it is the apprentice's own work.

Note: The submission of a **fully** completed showcase evidence reference form is mandatory, failure to do so means that the showcase will be returned by City & Guilds **without** being reviewed.

In the case where the showcase evidence has been referenced into the 'showcase evidence reference form' but it is **not** present within the showcase, the IEPA will request the missing evidence from the customer through the EPA team.

The EPA team will contact the customer asking for the missing evidence to be submitted. In this circumstance it is likely that the EPA date will be moved to accommodate the submission of the missing showcase evidence and allow the IEPA to review the showcase in preparation for the EPA event.

In order for the IEPA to proceed with the review of the showcase and plan the showcase interview, it is essential that the showcase evidence is referenced against the criteria requirements.

It is fundamental that both a personal development plan and a form of self-assessment (e.g. SWOT) have been provided and referenced on the evidence reference form. If these two pieces of evidence are referenced but not submitted, the IEPA will return the showcase to the EPA Team.

The EPA Team will contact the customer asking them to review the showcase evidence against the pass requirements and resubmit. The EPA may be postponed if the evidence is not submitted in sufficient time as the personal development plan and form of self-assessment are assessed prior to the EPA event. A final assessment decision will be made following the showcase interview at the live EPA event.

Guidance on how to put together a PDP has been provided within the End-point **Assessment Recording Forms for Centres/End-point Assessment Customers** document, together with a PDP template.

City & Guilds have created a 'Showcase checklist' to help apprentices and centres ensure that all relevant information is accounted for.

Showcase checklist		Tick when confirmed
1.	Is all evidence signed by the apprentice and dated? * E-signatures are also acceptable	
2.	Is all evidence valid, authentic, current and sufficient (VACS)?	
3.	Does evidence clearly show it is the apprentice's individual work (and if involved in team work is it clear the specific contribution the apprentice made)?	
4.	Does the evidence clearly demonstrate their relevant knowledge?	
5.	Have you used the evidence reference form? And has all evidence been referenced?	
6.	Does it showcase the apprentice's best pieces of work?	
7.	Is the majority of the evidence holistic in its nature?	
8.	Have you checked that you have not included any pieces of evidence that are duplicated or not relevant?	
9.	Is there sufficient evidence to cover the whole of the criteria and grading descriptors that has been referenced to?	
10.	Are any witness testimonies or employer references tailored to the apprentice?	
11.	Has any client/customer reference information been anonymised?	
12.	Have all external sources of information being appropriately documented and referenced to the original source, showing clear understanding of how they relate to the criteria?	

Showcase checklist		Tick when confirmed
13.	Has the appropriate stakeholder(s) eg employer/training provider checked whether the apprentice's portfolio meets all the required criteria and grading descriptors?	
Reminder: You must upload the completed evidence reference form to the EPA portal in word format		

* where witness testimonies are included as a piece of evidence these do not need to be signed by the apprentice but instead must be signed/authenticated as outlined within this document.

Guidance on completing the 'showcase evidence reference form'

Please refer to the guidance on how to complete the 'showcase evidence reference form' which is available within the '**End-point Assessment recording forms for Centres/ End-point-Assessment customers**' document.

Assessment environment

The showcase interview should take place face-to-face, typically on the same day as the practical observation and professional discussion. The customer must ensure that the interview is conducted in a suitable controlled environment throughout the duration of the assessment activity. ie a quiet room, free from distraction and influence, appropriate signposting, with the necessary equipment for this assessment method. It is anticipated the customer's premises will be used where possible.

Time allowed for the showcase interview

The showcase interview will last between a minimum of **15 minutes** and a maximum of **30 minutes**.

Apprentices who have failed the showcase will need to submit evidence against the previously **failed** criteria **only**. This could be a mixture of new evidence and evidence previously submitted. The full showcase should **not** be resubmitted.

Apprentices who have failed the showcase supported by interview will be required to submit the revised showcase **only**. New / revised evidence must be clearly referenced to make the assessment of the resit easier and quicker for the IEPA.

The showcase interview will **not** take place as part of the resit.

Assessment 701/751 Apprentice Showcase (with interview)

Assessment Component 1: Instructions for Apprentice

You will have compiled a portfolio of evidence during your apprenticeship, successfully demonstrating the required knowledge, skills and behaviours/attitude.

You must now select appropriate evidence from your portfolio to demonstrate the minimum requirements of the standard at the final stage of the programme as a 'showcase', which attests to professional competence at the level.

Your showcase needs to be submitted to the EPAO **two** weeks prior to the interview, which is likely to take place on the same day of the practical observation and professional discussion.

It is recommended that you submit your showcase electronically in **one** of the following formats:

- As a written report - typically between **3000 to 3500 words**, not including appendices.
or
- As a recorded audio presentation with bullet points/notes/presentation slides, including appendices. The audio recording typically would be between **30 to 45 minutes**.

Your showcase must cover **as a minimum** the following:

'Knowledge of your organisation'

- Understand the organisation
 - the aims of the organisation in relation to its sector
 - what is meant by the organisation's 'brand promise'
 - how the organisation's core values relate to its service culture
 - the purpose of different organisational policies and procedures that affect their customer service role.
 - the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment
- Meeting regulations and legislation
 - how the relevant legislation and regulations affect the organisation's customer service provision
 - own responsibilities for keeping information confidential in the organisation

- the responsibilities of employees and employers under the Health and Safety at Work Act
- Systems and resources
 - the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively

'Day to day customer service activities'

- Product and Service knowledge
 - the difference between the features and benefits of products and/or services in relation to the organisation
- Influencing skills
 - offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation
 - communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs
 - handle customer objections in a positive and professional manner
- Dealing with customer conflict and challenge
 - maintain calm and patience at all times when dealing with challenging customer situations
 - demonstrate sensitivity to, and interest in, the customers' concerns
 - communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers
 - resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures
 - keep customers informed of progress while resolving issues
 - maintain accurate record of customer issues and progress to resolution
- Team working
 - work with others in a positive and productive manner
 - communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently
- Personal organisation
 - prioritise and plan the completion of tasks according to agreed deadlines
 - use appropriate tools and techniques to monitor the progress of tasks completion
- Systems and resources

- the measures and evaluation tools used in the organisation to monitor customer service levels

'Your self-assessment and personal development'

- Product and Service Knowledge
 - how to maintain their knowledge of the organisation's products and/or services
- Developing self
 - conduct a self-assessment to identify their strengths and weaknesses in relation to the job role
 - produce a personal development plan to support the achievement of their agreed learning and development goals
- Being open to feedback
 - seek constructive feedback about their customer service skills and knowledge from others
 - use feedback from others to develop their customer service skills and knowledge.
- Team working
 - share personal learning and information with others to support good customer service practice

Note: Please refer to the 'Apprentice showcase (with interview) grading criteria' for details of distinction criteria.

Appendices are required for submission to support the showcase.

The appendices **must** include evidence of the following:

- handling customers in a variety of situations including resolving customer conflicts and/or challenging situations with associated records
- meeting deadlines including prioritising and planning the completion of tasks
- working with others including sharing personal learning and information
- reports or witness testimonies from sources such as mentors, managers, customers
- application of a self-assessment technique with possible feedback from others
- personal development plan(s) to support the achievement of agreed learning and development goals, with evidence of authentication.

Guidance on how to put together a PDP has been provided within **the End-point Assessment Recording Forms for Centres/End-point Assessment Customers** document, together with a PDP template.

The appendices may also include (but are not limited to) examples of work-based evidence covering, relevant documents or screen shots relating to customer service role, observations, customer feedback.

Before selecting the evidence to form the showcase, whether in the form of a written report or audio presentation with bullet points/notes/presentation slides, or supporting evidence in the appendix, you should review the assessment requirements stated in the standard as well as the following:

- the criteria to be covered by your showcase
- the type of supporting evidence that can be presented (see above)
- the minimum supporting evidence that should be presented
- the period of time from which the evidence should have originated (usually this will be towards the end of your apprenticeship), however some evidence such as self-assessment and performance review must be ongoing. Evidence collected towards the end of your apprenticeship programme, as you become independent in your work, is likely to provide the most holistic evidence – ie covering a number of criteria at once.

Confirming the evidence selection

When you have selected the evidence to form your showcase, you **must** review it with your employer / training provider.

Preparing evidence for submission

Evidence being uploaded for EPA must be presented as follows:

- each piece of evidence must have a header containing your name and handwritten/e-signature together with the date the evidence was produced;
- each piece of evidence must be referenced to the criteria it is being submitted against on the 'showcase evidence reference form' (found in the **End-point Assessment recording forms for Centres/ End-point Assessment customers** document)

This is to ensure that each piece of evidence is cross-referenced to each relevant criterion. Presenting the evidence in this way also formally confirms that it is your own work.

Note: The submission of a **fully** completed showcase evidence reference form is mandatory, failure to do so means that the showcase will be returned by City & Guilds **without** being reviewed.

You will be interviewed by the IEPA on the showcase.

The interview will last between a minimum of **15 minutes** and a maximum of **30 minutes**.

If you have failed the showcase you will need to submit evidence against the previously **failed** criteria **only**. This could be a mixture of new evidence and evidence previously submitted. The full showcase should **not** be resubmitted.

If you have failed the showcase supported by interview you will be required to submit the revised showcase **only**. New / revised evidence must be clearly referenced to make the assessment of the resit easier and quicker for the IEPA.

The showcase interview will **not** take place as part of the resit.

Assessment 701/751 Apprentice Showcase (with interview)

Recording forms

All recording forms can be found in **Assessment pack recording form** documents that are available in a word format. Please see below summary of the recording forms that are available for this assessment.

Recording form	Purpose	Who should complete	Where Can it be found
Showcase evidence reference form	For the apprentice to map and reference all evidence submitted for the portfolio;	Apprentice	End-point Assessment recording forms for centres/End-point Assessment customers

Assessment 701/751 Apprentice Showcase (with interview)

Grading criteria

Knowledge				
Standard	What do I need to know	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
Understanding the organisation				
1. Know the purpose of the business and what 'brand promise' means	1.1 What is the difference between public, private and third sector organisations?	State the aims of the organisation in relation to its sector		<p>Pass</p> <p>We expect that the evidence would include the aims of the organisation and an explanation of how these relate to the sector in which the organisation operates. Whilst larger organisations will have clear, visible aims, smaller organisations may not, hence apprentices may be required to show understanding of the purpose and direction of the organisation.</p> <p>When discussing brand promise it is likely for large organisations there will be a written and visible brand promise, but in medium to small organisations brand promise may be less visible, or there is no brand promise, so the apprentice may wish to use an example from a large organisation they are familiar with.</p> <p>It is expected that evidence will include an explanation of how the organisation's core values relate to its service culture.</p> <p>This is possible when the apprentice works in a large organisation, but those in medium to small organisations may require to use an example of an organisation they are familiar with.</p>
	1.2 What is your organisation business type and purpose? 1.3 What does 'brand promise' mean?	State what is meant by the organisation 'brand promise'		
2. Know your organisation's core values and how they link to the service culture	2.1 What is meant by an organisations core values? 2.2 What are your organisation's core values? 2.3 What is meant by service culture? 2.4 What is your organisation's service culture? 2.5 How does your organisation's core values link to the service culture?	Explain how the organisations's core values related to its service culture.	Explain how the organisational policies and procedures impact on the delivery of customer service	

Knowledge				
Standard	What do I need to know	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
				Suggested supporting evidence (appendices), for example: <ul style="list-style-type: none"> • Example of own organisation's aims • Example of brand promise, core values/ mission statement/ customer charter • Organisational induction • Witness Testimony • Recorded discussion with the relevant member(s) of staff of organisation • On-programme workbooks • Or a combination of the above
3. Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation	3.1 What is the purpose of an organisational policy? 3.2 List the organisational policies and procedures that could affect a customer service role? 3.3 What should be included in a complaints process/procedure?	State the purpose of different organisational policies and procedures that affect their customer service role		Pass Examples of own organisation's internal policies and procedures and understanding of the purpose that they serve, in relation to the customer service role, should be evidenced. We expect examples to include the organisation's complaints procedure, whether formal or informal. We expect evidence of own organisation's guidelines / policy, whether informal or formal, relating to digital media. This should also include an explanation of how the guidelines / policy affect the use of social and digital media in the work environment. Where own organisation does not have a digital media policy or guidelines, we expect research to cover this, possibly referring to another organisation's policy or guidelines.
	3.4 What is meant by digital media?	Describe the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment		

Knowledge				
Standard	What do I need to know	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
	3.5 What digital media policies exist in customer service organisations?			<p>Suggested supporting evidence (appendices), for example:</p> <ul style="list-style-type: none"> • Examples of own organisation's policies and procedures <ul style="list-style-type: none"> ○ Data protection policies, procedures and guidelines ○ Health and Safety policies, procedures and guidelines ○ Equality & Diversity policies, procedures and guidelines ○ complaints procedure (formal or informal) • Examples of organisation's digital media policy / guidelines • Staff handbook including Health and Safety guidance and own responsibilities • Witness Testimony • Recorded discussion with the relevant member(s) of staff of organisation • On-programme workbooks • Or a combination of the above <p>Distinction Inclusion of evidence and reflection on how the organisation's policies and procedures impact on the delivery of customer service.</p>

Knowledge				
Standard	What do I need to know	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
Meeting regulations and legislation				
1. Know the appropriate legislation and regulatory requirements that affect your business	1.1 Identify appropriate legislation and regulation and how this affects your organisation	Explain how the relevant legislation and regulations affect the organisation's customer service provision	Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations requirements	<p>Pass</p> <p>We expect to see a clear reflection and understanding of the appropriate legislation and regulations that affect the organisation's customer service provision. Evidence should include policies and procedures used by own organisation and how these ensure legislation and regulations are covered. We also require evidence of reflection on how these affect the organisation's customer service provision and own responsibilities, including keeping information confidential.</p> <p>We expect to see a reflection on and a clear understanding of own responsibilities and those of own employer under the Health and Safety at Work Act.</p> <p>Suggested supporting evidence (appendices), for example:</p> <ul style="list-style-type: none"> • Relevant legislation and regulations which affect own organisation, for example: <ul style="list-style-type: none"> ○ GDPR and Data Protection Act 2018 ○ Health and Safety at Work Act ○ Equality Act ○ Consumer Rights Act ○ Financial Services Act • Staff handbook including Health and Safety guidance and own responsibilities • Recorded discussion with relevant member(s) of staff of organisation • On-programme workbooks
2. Know your responsibility in relation to this and how to apply it when delivering service	2.1 Why is it important to keep information confidential within an organisation 2.2 What information needs to be kept and remain confidential within your organisation	State their responsibilities for keeping information confidential in the organisation.		
	2.3 What are the responsibilities of the employee under the health and safety at work act? 2.4 What are the responsibilities of the employer under the health and safety at work act?	State the responsibility of employees and employers under the Health and Safety at Work Act	Explain how a code of practice or ethical standards affects customer service.	

Knowledge				
Standard	What do I need to know	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
				<ul style="list-style-type: none"> • Or a combination of the above <p>Distinction</p> <p>Inclusion of evidence demonstrating an understanding of the potential impact on the organisation if there is failure to adhere to each of the relevant legislation and regulations requirements giving examples of what could happen.</p> <p>Evidence is required of clear reflection on and understanding of what is meant by a code of practice or ethical standards and how they affect customer service practice.</p>

Knowledge				
Standard	What do I need to know	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
Systems and resources				
1. Know how to use systems, equipment and technology to meet the needs of your customers	1.1 What are the systems, equipment and/or technology your organisation uses to effectively meet customer needs? 1.2 In your role how would you use the systems, equipment and/or technology to support customer needs?	Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively.	N/A	<p>Pass</p> <p>We expect an explanation showing clear understanding of the types of systems, equipment and/or technology own organisation uses to effectively meet customer needs, giving examples.</p> <p>We also expect a description showing clear understanding of the types of measures and evaluation tools used to monitor customer service levels in own organisation. For those not using measuring and evaluation tools, examples of those used in other organisations should be described.</p> <p>Suggested supporting evidence (appendices), for example:</p> <ul style="list-style-type: none"> • Examples of systems, equipment and/or technology used in own organisation • Results of evaluation of customer service levels such as: satisfaction rates, retention figures • Results of evaluation of customer service levels such as: satisfaction rates, retention figures • Customer feedback, survey, retention records • Referral/ handover documentation • Witness Testimony • Recorded discussion with the relevant member(s) of staff of organisation • On-programme workbooks • Or a combination of the above
2. Understand types of measurement and evaluation tools available to monitor customer service levels	2.1 What are the types of measurement used to monitor customer service level? 2.2 What are the types of evaluation tool used to monitor customer service levels?	Describe the measures and evaluation tools used in the organisation to monitor customer service levels.	N/A	

Knowledge				
Standard	What do I need to know	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
Product and service knowledge				
1. Understand the products or services that are available from your organisation and keep up-to-date	1.1 What are your organisations products and/or services?	Explain the difference between the features and benefits of products and/or services in relation to the organisation	Explain why it is important to update their knowledge on the organisation's products and/or services.	<p>Pass</p> <p>We expect a list of own organisation's products and/or services including an explanation of the difference between their features and benefits. Evidence should also include a description on how own knowledge of the organisation's products and/or services is updated and maintained.</p> <p>Suggested supporting evidence (appendices), for example:</p> <ul style="list-style-type: none"> • Examples of features and benefits of products and/or services of own organisation • Examples of methods used to keep up-to-date on own organisation's products and/or services • Learning log / Training Journal • Personal Development Plan • Continuous Professional Development Record (CPD) • Witness Testimony • Recorded discussion with relevant member(s) of staff of organisation • On-programme workbooks • Or a combination of the above <p>Distinction</p> <p>We expect an explanation showing a clear understanding of why it is important to update own</p>
	1.2 What is the difference between providing a product and providing a service.	Describe how to maintain their knowledge of the organisation's products and /or services		
	1.3 How do you update and maintain your knowledge of your organisations products and/or services?			

				knowledge on the organisation's products and/or services.
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Skills

Standard	What do I need to do	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
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Influencing skills

1. Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation	1.1 Identify customer needs	Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation	Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached.	<p>Pass</p> <p>We expect to see evidence of a practical demonstration(s) of how the customers have been offered appropriate product and/or service options to meet both their needs and the needs of the organisation.</p> <p>There should also be practical demonstrations of clear communication of the offer of products and/or service options, with clear explanations of how these meet the customers' needs.</p> <p>We also expect to see evidence of handling customer objections in a positive and professional manner within the limit of own authority as agreed by your organisation. Positive and professional behaviour expected to be seen would include use of appropriate communication techniques.</p> <p>It is also expected that clear understanding of organisational policies and procedures are demonstrated throughout.</p> <p>Suggested supporting evidence (appendices), for example:</p> <ul style="list-style-type: none"> • Customer Complaint Log • Examples of written and/or digital communication • Coaching/ observation
	1.2 Offer product and/or service options to customers in a logical and reasoned manner	Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs.		
	1.3 Clearly explain how options offered meets the customers' needs.			
	1.4 Handle customer objections in a positive and professional manner	Handle customer objections in a positive and professional manner		

				<ul style="list-style-type: none"> • Mystery shop report • Call recording • Case summaries • Customer feedback/ commendation • Service level agreement (or similar) • Organisation customer service policy • Witness testimony • Recorded discussion with relevant member(s) of staff of organisation • On-programme workbooks • Or a combination of the above <p>Distinction Inclusion within the evidence to demonstrate where appropriate explanations have been given to customers where a beneficial outcome could not be reached.</p>
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Skills				
Standard	What do I need to do	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
Personal organisation				
1.Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines	1.1 Agree goals and deadlines for completing tasks with an appropriate person 1.2 Prioritise and plan the completion of tasks to meet delivery deadlines	Prioritise and plan the completion of tasks according to agreed deadlines	Respond in a professional manner to challenges and changes and adjust priorities accordingly.	<p>Pass</p> <p>We would expect to see evidence of prioritising and planning tasks carried out on a daily basis showing how these have been completed according to agreed deadlines (formal and/or informal).</p> <p>We expect to see evidence of the tools and techniques you would use that are available in your organisation to monitor the progress of tasks, (formal and/or informal).</p> <p>Suggested supporting evidence (appendices), for example:</p> <ul style="list-style-type: none"> • To do list • Workplace diaries (paper based / online), calendars, schedulers, planners • Project planning tools eg: Gantt charts, Resource and planning record • Examples of written and/or digital communication • Coaching/ observation • Witness testimony • Recorded discussion with relevant member(s) of staff of organisation • 1-to-1/ Performance review • On-programme workbooks • Or a combination of the above
	1.3 Use tools and techniques to monitor progress of tasks 1.4 Monitor and adjust priorities as required 1.5 Meet agreed deadlines	Use appropriate tools and techniques to monitor the progress of tasks completion.		

				<p>Distinction</p> <p>We would also expect to see evidence of how challenges and changes have been responded to in a professional manner. There should also be inclusion of evidence to demonstrate how priorities have been adjusted accordingly.</p>
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Skills				
Standard	What do I need to do	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
Dealing with customers conflict and challenge				
1.Demonstrate patience and calmness.	1.1 Show patience, calmness and empathy when dealing with challenging customer situations 1.2 Use active listening skills when communicating with customers 1.3 Use appropriate questioning skills	Maintain calm and patience at all times when dealing with challenging customer situations.	Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.	Pass A <i>minimum of two</i> situations dealing with customer conflict and challenge should be evidenced that demonstrate the following: Evidence of a variety of challenging customer situations where active listening skills and effective questioning skills are demonstrated, showing also calm and patience at all times. We expect to see evidence across a variety of customers' conflicts and/or challenges that resolution or onward referral for resolution is managed in line with organisational policies and procedures. There should also be evidence of the apprentice having been sensitive to and interested in the customer concerns, communicating in a clear and coherent manner, the next /steps and/or options aiming to meet the needs and expectations of their customers. We expect to see in such situations a demonstration of sensitivity to, and interest in, the customers' concerns. We expect to see inclusion of evidence to demonstrate
2.Show you understand the customer's point of view.	2.1 Show understanding of the customer view point	Demonstrate sensitivity to, and interest in, the customers' concerns.		

<p>3. Use appropriate signposting or resolution to meet your customers' needs and manage expectations.</p>	<p>3.1 Explain the next steps and/or customer options in a logical manner</p>	<p>Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers.</p>		<p>that customers have clearly understood the options available and /or the onward progress of their query. We also expect to see evidence of accurate records of customers' issues and progress. Records can be formal or informal according to the organisation. Records may be confidential and so witness testimony will be accepted in such situations. We expect to see in such situations a demonstration of sensitivity to, and interest in, the customers' concerns. Inclusion of evidence to demonstrate that customers have clearly understood the options available and /or the onward progress of their query.</p> <ul style="list-style-type: none"> • Complaints log • Case summaries • Examples of written and/or digital communication • Coaching/ observation • Mystery shop report • Call recording • Customer records • Customer feedback, survey etc • Referral/ handover documentation • 1-to-1s/performance reviews • Witness testimony • Recorded discussion with relevant member(s) of staff of organisation • On-programme workbooks
	<p>3.2 Provide clear sign-posting or resolution to meet customers' needs and manage customer expectations</p> <p>3.3 Deal with the customer conflict or challenge presented in line with organisational and/or policies procedure</p> <p>3.4 Resolve customer conflict or challenge presented in line with organisational policies and/or procedures</p>	<p>Resolve customer conflict and/or challenges in line with the relevant organisational policies and/or procedures.</p>		<p>Distinction</p>

4. Maintain informative communication during service recovery.	4.1 Keep customers informed of progress while resolving issues	Keep customers informed of progress while resolving issues		The apprentice must also demonstrate taking ownership of customer issues, showing evidence of taking appropriate actions to ensure customers' needs and expectations are met. (This could be possibly shown through evidence of keeping customers informed as promised in line with organisational guidelines, even if no further update is available.)
	4.2 Maintain accurate record of customer issues and progress to resolution	Maintain accurate record of customer issues and progress to resolution		

Behaviours/ Attidue				
Standard	What do I need to show	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
Developing self				
1. Take ownership for keeping your service knowledge and skills up-to-date.	1.1 Identify own strengths and weaknesses in relation to working within a customer service role 1.2 Apply the techniques of self-assessment to look at strengths and weaknesses	Conduct a self-assessment to identify their strengths and weaknesses in relation to the job role	Review the effectiveness of their personal development plan and updated it accordingly	<p>Pass</p> <p>A technique of self- assessment must be completed by the apprentice, for example SWOT analysis, skills gap analysis or similar in relation to own job role.</p> <p>Evidence must also include a personal development plan that supports the achievement of agreed learning and development goals.</p> <p>It is advantageous that there is evidence of customer service knowledge and skills being kept up to date throughout the apprenticeship.</p> <p>Evidence must include:</p> <ul style="list-style-type: none"> • SWOT analysis, skills gap analysis or similar • Personal Development Plan (PDP), having been agreed, signed and dated by the apprentice and appropriate person eg manager, tutor. <p>Suggested supporting evidence (appendices), for example:</p> <ul style="list-style-type: none"> • Continuous Professional Development logs • Learning Log / training journal • Coaching/ observation • Mystery shop report • Call recording • Customer feedback, survey, questionnaire etc • 360 degree feedback • 1-to-1s/performance reviews/appraisals
2 Consider personal goals and propose development that would help achieve them	2.1 Prepare a personal development plan that helps to achieve personal goals and development needs. 2.2 Review and update your personal development plan	Produce a personal development plan to support the achievement of their agreed learning and development goals		

				<ul style="list-style-type: none"> • Witness Testimony • Recorded discussion with relevant member(s) of staff of organisation • On-programme workbooks • Or a combination of the above <p>Distinction</p> <p>Inclusion of evidence to demonstrate the effectiveness of the apprentice's personal development plan; and that it has been reviewed and updated accordingly, having been agreed, signed and dated by the apprentice and appropriate person eg manager, tutor.</p>
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Behaviours/ Attitude				
Standard	What do I need to show	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
Being open to feedback				
1. Act on and seek feedback from others to develop or maintain personal service skills and knowledge	1.1 Identify suitable ways of obtaining informal and formal feedback from others 1.2 Obtain useful and constructive feedback about your own service skills and knowledge from others	Seek constructive feedback about their customer service skills and knowledge from others.	n/a	<p>Pass</p> <p>Evidence should include a variety of methods of obtaining informal and formal feedback from others on own customer service skills and knowledge. We expect to see clear evidence of positive and negative (if applicable) feedback and that it is positively accepted and used to maintain and develop own customer service skills and knowledge.</p> <p>Suggested supporting evidence (appendices):</p> <ul style="list-style-type: none"> • Personal Development Plan (PDP) • Continuous Professional Development logs • Coaching/ observation • Mystery shop report • Call recording • Customer feedback, survey, questionnaire et

	<p>1.3 Positively respond to all feedback</p> <p>1.4 use the feedback received to take responsibility for maintaining and developing your personal customer service skills and knowledge</p>	<p>Use feedback from others to develop their customer service skills and knowledge.</p>	<p>n/a</p>	<ul style="list-style-type: none"> • 360 degree feedback • 1-to-1s/performance reviews • Written and/or digital communication • Witness testimony • Recorded discussion with relevant member(s) of staff of organisation • On-programme workbooks • Or a combination of the above
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Behaviours/ Attitude				
Standard	What do I need to show	Pass criteria (To achieve a pass the apprentice has to)	Distinction criteria (To achieve a distinction the apprentice must achieve everything at pass grade and has to)	Evidence Guidance for written report or audio presentation and suggested types of evidence (appendices)
Team working				
1. Frequently and consistently communicate and work with others in the interest of helping customers efficiently.	1.1 Demonstrate the interpersonal skills required to work effectively as part of a team	Work with others in a positive and productive manner	Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers	<p>Pass</p> <p>We expect to see evidence of working with others in a positive and productive manner as part of a team, supporting them to meet customer's needs. There must also be evidence of having demonstrated the appropriate interpersonal skills and of communicating information in a timely and reliable manner. The apprentice must provide evidence of own learning in daily dealings with customers and that this personal learning and information has been shared with others to support good customer service practice.</p> <p>Suggested supporting evidence (appendices) for example:</p> <ul style="list-style-type: none"> • Examples of written and/or digital communication • Coaching/ observation • Call recording • Customer feedback, survey etc • Referral/ handover documentation • 360 degrees feedback • Peer feedback • 1-to-1s/performance reviews/appraisals

	<p>1.2 Communicate consistently with team members in the interest of helping customers</p> <p>1.3 Demonstrate cooperation when working with others</p>	<p>Communicated information in a timely and reliable manner to team members to support them in meeting customer needs efficiently</p>		<ul style="list-style-type: none"> • Staff meeting minutes • Witness testimony • Recorded discussion with relevant member(s) of staff of organisation • On-programme workbooks • Or a combination of the above <p>Distinction Evidence of recognition of when to adapt personal behaviours and communication approach to meet the needs of team members and customers.</p> <p>Presented reasoned ideas for improving customer service practice to the appropriate colleagues.</p>
<p>2. Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice.</p>	<p>2.1 Share personal learning with others to support good practice</p> <p>2.2 Present your ideas and recommendations for improvements in customer service to others</p>	<p>Shared personal learning and information with others to support good customer service practice</p>	<p>Presented reasoned ideas for improving customer service practice to the appropriate colleagues</p>	<p>(We expect to see evidence of presenting a minimum of two ideas and recommendations for improving customer service practice, with reasons, to the appropriate colleagues.</p>

Assessment 702/752 Practical observation

Assessment specification

Assessment Component	Description	Coverage	Grading
2	Practical Observation	Knowledge: N/A Skills: Interpersonal skills 1.1 – 1.4; Communication 1.1 – 1.3 and/or 1.4- 1.6; Behaviours/Attitude: Equality – treating all customers as individuals 1.1 – 1.2; 2.1; Presentation – dress code, professional language 1.1 – 1.3 or 1.4 – 1.7; Right first time 1.1 – 1.8; 2.1 – 2.7.	P/D/X

Assessment 702/752 Practical observation

Assessment Component 2: Instructions for centres / End-point Assessment customers

The practical observation provides the opportunity for substantial synoptic assessment across the standard and **must** include customer interaction.

The practical observation will be booked by you for the apprentice through the City & Guilds EPA team.

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

The observation should enable the apprentice to evidence their skills and behaviours/attitude from across the standard to demonstrate genuine and demanding work objectives. This **must** be at a time of day when the apprentice will have opportunity to meet a range of customers.

Note: It is fundamental that during the practical observation the apprentice will interact with customers in order to meet the requirements of the observation criteria, as listed in the Assessment Specification.

Each situation within the observation will be different, and examples are, handling a general enquiry, dealing with a customer complaint or a need for further information or detail, but it is mandatory that the observation covers as a **minimum**:

- presentation
- equality
- interpersonal skills
- communication
- personal organisation.

We recognise that some aspects of the standard may not happen during the practical observation. Those areas of the standard which are not able to be evidenced during the observation will be discussed as part of the professional discussion with the IEPA.

Note: The majority of the standard should be practically demonstrated, the professional discussion should not be relied upon to cover large areas of the standard.

Time allowed for Practical Observation

The Practical Observation will last a **minimum of 1 hour to a maximum of 1 hour 30 minutes**. A lack of sufficient evidence gathered during that time may require an extension to the hour.

It should be noted that the practical observation is a synoptic assessment therefore during a resit the apprentice will need to be able to demonstrate the **criteria** they **previously passed**, **not just** the **criteria** they **failed** during the original assessment.

Assessment 702/752 Practical observation

Assessment Component 2: Instructions for Apprentice

The practical observation will be pre-planned and scheduled to when you **must** be in your normal place of work and will be carried out by the IEPA. The observation should enable you to evidence your skills and behaviours/attitude from across the standard to demonstrate genuine and demanding work objectives.

This **must** be at a time of day when you will have opportunity to meet a range of customers.

Note: It is fundamental that during the practical observation you will interact with customers in order to meet the requirements of the observation criteria, as listed in the Assessment Specification.

Each situation within the observation will be different, and examples are, handling a general enquiry, dealing with a customer complaint or a need for further information or detail, but it is mandatory that the observation covers as a **minimum**:

- presentation
- equality
- interpersonal skills
- communication
- personal organisation.

We recognise that some aspects of the standard may not happen during the practical observation. Those areas of the standard which are not able to be evidenced during the observation will be discussed as part of your professional discussion with the IEPA.

Note: The majority of the standard should be practically demonstrated, the professional discussion should not be relied upon to cover large areas of the standard.

Time allowed for Practical Observation

The Practical Observation will last a **minimum of 1 hour to a maximum of 1 hour 30 minutes**. A lack of sufficient evidence observed during that time may require an extension to the hour.

It should be noted that the practical observation is a synoptic assessment therefore during a resit you will need to be able to demonstrate the **criteria you previously passed, not just the criteria you failed** during the original assessment.

Assessment 702/752 Practical Observation

Grade descriptors table

		Pass	Distinction
Interpersonal skills	1.1	The apprentice demonstrated willingness and ability to engage with customers in a positive manner using relevant interpersonal skills.	The apprentice demonstrated the ability to adapt interpersonal skills when working on meeting the needs and expectations of different customers, showing knowledge of the application of the Equality Act when communicating (verbally or non-verbally).
	1.2, 1.3	The apprentice worked with customers to build a rapport, recognising and where possible meeting their needs and expectations	The apprentice demonstrated ability to balance the needs and expectations of the customer with that of the organisation
	1.4	The apprentice showed willingness to work with others and shared ideas where appropriate	The apprentice pro-actively worked with others to ensure efficient customer service delivery.
Communication Face to face	1.1	The apprentice demonstrated ability to make initial customer contact and use appropriate verbal and non-verbal communication skills	In all roles, the apprentice demonstrated ability to adapt communication - tone, behaviour and language - to different customers and their interactions, showing clear knowledge of the application of the Equality Act in all customer handling.
	1.2	The apprentice adapted tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations.	
	1.3	The apprentice demonstrated ability to recognise when to summarise and the techniques to use.	

Communication Non-facing	1.4	The apprentice demonstrated ability to make initial customer contact and make use of appropriate communication skills	In all roles, the apprentice demonstrated ability to flex to various customer personalities, while remaining calm and in control where necessary. They also demonstrated they know the organisational procedures to be followed in all communication and the importance to the brand/organisation of this requirement.
	1.5	The apprentice demonstrated adapting tone and behaviour when necessary, recognising and confirming understanding of needs and expectations	
	1.6	The apprentice demonstrated ability to recognise and use reinforcement techniques during customer interactions	
Equality	1.1, 1.2	The apprentice recognised and responded to individual needs to provide a personalised customer service experience.	n/a
	2.1	The apprentice behaved in a way that upholds the core values and service culture of the organisation.	
Presentation Face-to-face	1.1, 1.2, 1.3	The apprentice presented a professional image in line with the organisational dress code and code of conduct.	n/a
Presentation Non-facing	1.4, 1.5	The apprentice demonstrated a positive attitude and welcoming approach consistently when dealing with customers.	
	1.6, 1.7	The apprentice maintained professional and positive language consistently in customer interactions.	
“Right first time”	1.1	The apprentice demonstrated ability to confidently approach customers, remaining positive and professional when circumstances are challenging.	n/a
	1.2, 1.3, 1.4	The apprentice showed an ability to establish needs and expectations, working towards meeting them where possible, explaining when necessary when they cannot be met.	

	1.5, 1.6, 1.7, 1.8	The apprentice demonstrated knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures.	
	2.1, 2.2	The apprentice demonstrated recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers.	
	2.3, 2.4	The apprentice took ownership from beginning to end, building and maintaining a relationship with the customer.	
	2.5, 2.6, 2.7	The apprentice recognised the importance of good customer service to the customer and in turn the organisation, making contact as promised, referring to others as necessary with all required detail, following up to ensure conclusion.	

Assessment 703/753 Professional Discussion

Assessment specification

Assessment Component	Description	Coverage	Grading
3	Professional Discussion	Knowledge: Knowing your customers 1.1 – 1.3; 2.1 – 2.5; 3.1 – 3.8; Your role and responsibilities 1.1-1.2; 2.1-2.2; Customer experience 1.1-1.3; 2.1-2.2 Skills: N/A Behaviours/Attitude: N/A	P/D/X

Assessment 703/753 Professional Discussion

Assessment Component 3: Instructions for centres / End-point Assessment customers

The Professional Discussion will take place where possible following the practical observation and will be booked by the employer/training provider for the apprentice through the City & Guilds EPA team. The Professional Discussion will be conducted between the apprentice and the appointed IEPA. The conditions under which the Professional Discussion will take place will be arranged with the City & Guilds EPA team.

Assessment Environment

For the Professional Discussion, the employer/training provider are responsible for ensuring the assessment takes place in appropriate surroundings which are free from distractions and interruptions; this could include ensuring that appropriate signposting and other arrangements are in place that will maintain a suitable environment without disruption throughout the duration of the assessment activity. It is essential that the Professional Discussion will be private and not disturbed.

The suitable venue for professional discussion could be in a private room on the premises of the employer or the centre, and be in person or taken remotely. Please refer to the resources list in this pack and any additional information given by the City & Guilds EPA team.

The Professional Discussion will be a structured discussion between the apprentice and the IEPA, where possible following the practical observation, to establish the apprentice's understanding and application of knowledge, skills and behaviours/attitude.

To ensure standardisation and consistency the Professional Discussion will be assessed against the set criteria stated in the assessment specification, including:

- Knowing your customers
- Your role and responsibility
- Customer experience

The employer/training provider are required to explain the purpose of the professional discussion and structure to the apprentice in advance of the EPA and share the relevant grading criteria.

The purpose of the professional discussion is also to:

- clarify any questions the IEPA has from their assessment of the apprentice journey, showcase interview and practical observation
- confirm and validate judgements about the quality of work
- explore aspects of the work, including how it was carried out, in more detail
- discuss how the apprentice would behave in specific scenarios, should they not have occurred within the practical observation
- ask questions in relation to personal development and reflection

The professional discussion will be graded by the Independent End-point Assessor based on the standard and grading criteria.

Time allowed for Professional Discussion

The Professional Discussion will last **a minimum of 30 minutes to a maximum of 1 hour**, depending on the time required to cover all necessary criteria. This is at the discretion of the IEPA.

It should be noted that the professional discussion is a synoptic assessment therefore during the apprentice will need to be able to demonstrate the **criteria** they **previously passed, not just the criteria** they **failed** during the original assessment.

Assessment 703/753 Professional Discussion

Assessment Component 3: Instructions for Apprentice

Following the practical observation a professional discussion will take place between yourself and the IEPA. The professional discussion will allow the IEPA to explore particular areas, to analyse the full range of your evidence, and to confirm your performance against the standard.

To ensure standardisation and consistency the Professional Discussion will be assessed against the set criteria stated in the assessment specification, including:

- Knowing your customers
- Your role and responsibility
- Customer experience

In addition the Professional Discussion will give the opportunity to clarify any questions the IEPA has from their assessment of your journey, showcase interview and practical observation. You may be asked to discuss how you would behave in specific scenarios, should they not have occurred within the practical observation.

During the professional discussion you should draw on the evidence gathered for your showcase, the practical observation and experiences during your apprenticeship.

If you wish to have your showcase portfolio and any supporting notes during the EPA you may print a hard copy in advance.

Time allowed for Professional Discussion

The Professional Discussion will last **a minimum of 30 minutes to a maximum of 1 hour**, depending on the time required to cover all necessary criteria. This is at the discretion of the IEPA.

It should be noted that the professional discussion is a synoptic assessment therefore during a resit you will need to be able to demonstrate the **criteria** you **previously passed**, **not just the criteria** they **failed** during the original assessment.

Assessment 703/753 Professional Discussion

Grade descriptors table

		Pass	Distinction
Knowing your customers	1.1 – 1.3;	The apprentice explained the difference between internal and external customers in the context of their organisation.	The apprentice explained the importance of building good customer relationships to the organisation
	2.1 – 2.5		The apprentice explained the difference in the way internal and external customer relationships are managed
	3.1 – 3.4	The apprentice described the specific needs of different customers, including those protected under current Equality law.	The apprentice explained the importance of balancing the needs of both the organisation and its customers.
	3.5 – 3.6	The apprentice explained when and how to adapt the service approach to meet the needs and expectations of customers	
	3.7 – 3.8	The apprentice explained when and how to adapt their service approach to meet the needs and expectations of customers.	
Your role and responsibilities	1.1 – 1.2	The apprentice explained how the actions taken in the context of their job role and responsibilities impact on others in the organisation	N/A
	2.1 – 2.2	The apprentice described how to achieve their agreed targets and goals	

Customer experience	1.1 – 1.3	The apprentice explained how an understanding of the facts can be used to create a customer focused experience	The apprentice explained how to respond to customer needs and requirements positively.
	2.1 – 2.2	The apprentice explained how to build trust with customers and the importance of doing so.	

Useful contacts

Centres

Exam entries, Certificates,
Registrations/enrolment, Invoices,
Missing or late exam materials, Nominal
roll reports, Results

E: centresupport@cityandguilds.com

Learners

General qualification information

E: learnersupport@cityandguilds.com

Other contacts

For other contacts visit the Contact Us
page of our website

W: www.cityandguilds.com/help/contact-us

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