

Sutton and District Training

Customer Service Specialist

Apprenticeship

Level 3 Standard



Apprenticeship Journey

Employer

Supporting the apprentice with regular progress reviews, work based training and time to complete apprenticeship tasks during the working day.

Apprentice

Attending all training and coaching sessions, submitting work set on time and providing evidence of knowledge, skills and behaviours.

Apprentice & Employer

The apprenticeship journey consists of many different stages, below we have provided more information on some of them :

ENGAGEMENT

Firstly, we need to ascertain employer needs and objectives and evaluate all training options. If apprenticeships are chosen, we will then establish which Apprenticeship Standards are most suitable for the organisation and its employees.

NOMINATION

Following the engagement process, employers are encouraged to put forward names (nominate) staff members who have shown an interest in undertaking an apprenticeship.

INITIAL ASSESSMENT – LINE MANAGER

A meeting between the Subject Specialist and the Line Manager takes place to ensure knowledge skills and behaviours as required by the standard align with apprentice's role and line managers' ability to support the apprentice. The apprenticeship bespoke Training Plan will start being prepared.

INITIAL ASSESSMENT – APPRENTICE

A meeting between the Subject Specialist and the apprentice takes place to ensure knowledge skills and behaviours as required by the standard align with apprentice's role and to ensure that the apprentice has a full and informed understanding of the apprenticeship prior to enrolment. The apprenticeship bespoke Training Plan will start continue being planned.

FUNCTIONAL SKILLS – MATHS AND ENGLISH

Maths and English at Level 1 or 2 are a requirement of all apprenticeships, before enrolment an apprentice will either provide certificates of prior attainment or complete an indicative assessment on BKSB (online Maths & English initial assessment program).

START DATE IS CONFIRMED AND TRAINING BEGINS

PROGRESS REVIEWS

These are conducted at 12 week intervals with the line manager and apprentice. These are designed to check on apprentice progress, provide support to employer and apprentice, ensure all apprentice training is being delivered and set apprenticeship objectives for the next 12 weeks.

Initial Assessment

Before the employer, the line manager and the apprentice commit to an apprenticeship it is crucial to ensure that the right apprenticeship, at the right level, is selected.

This first step is conducted with the Subject Specialists, it usually takes place via a video call and lasts approximately 30-40 minutes.

Line Manager

INITIAL ASSESSMENT - LINE MANAGER

Conducted between the Line Manager and the Subject Specialist.

The Line Manager will have an understanding of the apprentices' roles and responsibilities, whilst the Subject Specialist will have an in-depth understanding of the apprenticeship requirements.

During the call, each area of the apprenticeship is considered in the context of its relevance to apprentices' current role, the knowledge that will be taught, the skills and behaviours that the apprentice will need to demonstrate.

The apprenticeship requires ongoing commitment from the Line Manager, this process raises their awareness of apprenticeship requirements from the outset. Other requirements such as Off the Job Training (OTJ) and IT requirements are also addressed.

INITIAL ASSESSMENT - APPRENTICE

Conducted between the Apprentice and the Subject Specialist.

Each area is considered in detail and requirements explained to the apprentice. The apprentice is asked to explain their current understanding of the subject matter. Based on their answers the Subject Specialist will rate the apprentice's current ability. These results are used to record the Prior Learning Recognition (PLR) which in turn is used to calculate the OTJ hours required for the duration of the apprenticeship. If the PLR is at a considerably higher level, a higher level apprenticeship is likely to be recommended.

Mathematics and English functional skills at Level 1 are required for all Level 2 apprenticeships and Level 2 functional skills are required for all apprenticeships at Level 3 and above. If the apprentice does not have certificates of prior attainment, they will need to complete Functional Skills Initial Assessments prior to enrolment.

This initial time commitment is an investment in the future, it ensures apprenticeship relevance to the apprentice's role and it significantly increases success rates.

Apprentice

Apprentices are required to complete Initial Assessments relevant to their preferred apprenticeship and Initial Assessment in Functional Skills Maths and English.

Apprenticeship Journey

Engagement

Employer Engagement



Identifying Apprentices



Confirm Eligibility

Enrolment

Initial Assessment - Skill Scan



Initial Assessment - Functional Skills



Agreement is Signed

Delivery

Apprentices' Start is Planned



Induction



On Programme Training

Completion

Mock Assessment



Gateway



End-Point Assessment

Progression

Completion



Progression



Future Learning

About the Apprenticeship



Start date
Flexible



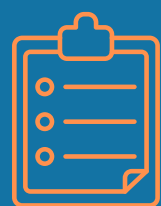
Level 3



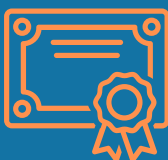
Duration
15 Months



Delivery
Virtually
In-Person



Assessment
End-Point Assessment
On Programme



Progression
Various opportunities

Customer Service Specialist Level 3

The main purpose of a customer service specialist is to be a 'professional' for direct customer support within all sectors and organisation types. You are an advocate of Customer Service who acts as a referral point for dealing with more complex or technical customer requests, complaints, and queries. You are often an escalation point for complicated or ongoing customer problems. As an expert in your organisation's products and/or services, you share knowledge with your wider team and colleagues. You gather and analyse data and customer information that influences change and improvements in service. Utilising both organisational and generic IT systems to carry out your role with an awareness of other digital technologies. This could be in many types of environment including contact centres, retail, webchat, service industry or any customer service point.

Typical Job Roles

The administration role may be a gateway to further career opportunities, in a variety of customer service roles progressing into customer service management.

Suggested Sectors

This apprenticeship feeds into an unlimited number of different professional sectors

Entry Requirements

Individual employers will set their selection criteria but the standard includes Maths and English understanding and functional application at Level 1, enabling apprentices to aspire to the next level. Employers will set the entry specification suitable for the correct level of the individual.

Knowledge, Skills and Behaviours



Full competence for a Customer Service Assistant, Customer Service Executive, Customer Service Manager or other Customer Service roles will be demonstrated by delivery and understanding of the following:

Knowledge

- Business knowledge and understanding
- Customer journey knowledge
- Customer insight
- Knowing customers and their needs
- Customer service culture
- Environment Awareness

Skills

- Business-focussed service delivery
- Providing a positive customer experience
- Working with customers
- Working with customer insights
- Customer service performance
- Service Improvement

Behaviours

- Develop self
- Ownership
- Responsibility
- Teamwork
- Equality
- Presentation



Gateway and EPA

EPA Weighting

Practical Observation

33%

Work Based Project

33%

Professional Discussion

33%



At Gateway meeting, using the portfolio of evidence the employer and assessor will agree that the portfolio of evidence and the EPA elements are complete or prepared for and meet the requirements of the standard.

Practical Observation

The apprentice must be observed, by an independent assessor, undertaking a range of day-to-day workplace activities. The observation should involve activities which allow the apprentice to demonstrate the full range of their knowledge, skills and behaviours required. The observation must include questioning to clarify knowledge and understanding is being applied. Standardised questions must be devised by the EPAOs to explore the apprentice's knowledge, skills and behaviour related to the KSBs in Appendix A. Questions must be open questions and independent assessors may ask supplementary questions as required to seek further clarification. Supplementary questions will be devised by the independent assessor as required.

Work Based Project

Apprentices must submit a written report, on a project they have carried out, to their EPA) 2 weeks prior to an interview date. This date will be agreed upon when the apprentice passes through a gateway process. The subject of the project report should be agreed upon with the EPAO with guidance from their employer in order to allow them to comment on the appropriateness for their business, but the EPAO must make a decision to ensure consistency. The work-based project is designed to ensure the apprentice's learning meets the needs of the business and is relevant to their role.

Professional Discussion

The professional discussion will last for 60 minutes. During the discussion, evidence from the on-programme portfolio of evidence will be used as a base to support the discussion. The apprentice will extract, from their portfolio, evidence that is suitable for supporting them in their professional discussion.

PROGRESS REVIEWS



Progress Review

The Apprentice
Line Manager
Tutor



Wellbeing

Safeguarding
Prevent
Equality
Diversity
Inclusion
Health and
Safety



SMART TARGETS

With all parties
agreed, tasks
for the next 12
weeks are
planned

A progress review is a 12-weekly contractual monitoring meeting between the line manager, the apprentice and the tutor

Progress

Progress between the review and the current review is recorded in a table and the RAG rating is implemented.

Reflection

The apprentice is required to reflect on the past 12 weeks by stating what new knowledge and skills they have learned and explained what the impact of this learning has been.

Wellbeing

The focus is not only on progress but also on the welfare of the apprentice, monitoring their health and safety and equality of opportunity.

Line Manager Feedback

Line Managers are encouraged to provide feedback relevant to the apprentice's progress and comment on changes apprentices' work-based performance as the result of the training.

Forward Planning

The three parties will consider the areas that will be next covered in training in the upcoming 12 weeks. The collaboration between the three parties here is of the utmost importance. They need to ensure that operational objectives align with the apprentice's duties and upcoming training.

Career Aspirations

During the reviews the tutor will speak with the apprentice about their long-term career aspirations and offer relevant support and guidance.

Functional Skills Overview

IA

Initial Assessment
Completed on BKS

DA

Diagnostic Assessment
Completed on BKS



Tutor Support



Specialist Support



Mock Tests



Tests



Certification

At Level 2 apprenticeship you are required to have passed Maths and English at Level 1. Level 1 Functional Skills are equivalent to a GCSE Grade E-D (2-3), and Level 2 Functional Skills are equivalent to GCSE Grade C-A*(4-9).

BKSB

To support apprentices development of Functional Skills we have engaged the services of EdTech specialist BKSB, established for over 20 years they are used by thousands of educators and millions of learners around the world. Apprentices are provided with online access and supported by their tutors

Tutor Support

During coaching session tutors will assess apprentices progress on BKSB and provide any additional teaching that could be required

Specialist Support

On occasion, specialist support is needed. Sutton & District Training have a designated Functional Skills Lead who is there to offer specialist support to learners in addition to the support provided by their designated tutors

Mock Exams

Before the exam all apprentices are encouraged to take mock exams, these are marked by the Functional Skills Lead and feedback is provided

Functional Skills Exams

Functional Skills Exams are arranged at the time and date that is most convenient for the apprentice and the manager. They are invigilated and take place on line usually within the first 6 months from the start of the apprenticeship. Location of the exam is at the learners discretion, but usually in a quiet office in their place of work.

Off the Job Training

What can be included

Teaching

The teaching of theory

Training

Shadowing & Mentoring

Learning

Learning support and time spent writing assessments

What can't be included

Training

Training on skills not required in the standard

Reviews

Progress Reviews

Functional Skills

English and Maths training is funded separately

Off-the-job training must make up at least 20% of the apprentice's normal working hours (paid hours excluding overtime) over the planned duration of the apprenticeship.

ESFA DEFINITION

Off-the-job training is a statutory requirement for an English apprenticeship. It is training which is received by the apprentice, during the apprentice's normal working hours, for the purpose of achieving the knowledge, skills and behaviours of the approved apprenticeship referenced in the apprenticeship agreement. By normal working hours we mean paid hours excluding overtime.

It is not on-the-job training which is training received by the apprentice for the sole purpose of enabling the apprentice to perform the work for which they have been employed. By this we mean training that does not specifically link to the knowledge, skills and behaviours set out in the apprenticeship

Examples of off the job training include:

- Induction training for job role
- Induction training for your qualification
- Online learning / training
- Independent study / research
- Shadowing staff in other departments / roles
- Technical training for your role
- Time spent completing your assignments / tasks for your qualification
- Qualification workshops – Face to face or Zoom
- Attending off the job training courses

Get in Touch To Progress

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