

# **Sutton and District Training**

**Customer Service  
Practitioner Apprenticeship  
Level 2 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

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.

### 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.

## Apprentice

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

### 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.

# 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



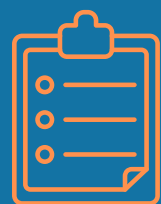
Level 2



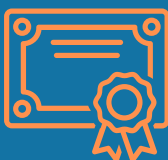
Duration  
12 Months



Delivery  
Virtually  
In-Person



Assessment  
End-Point Assessment  
On Programme



Progression  
Various opportunities

## Customer Service Practitioner Level 2

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.

### 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.

# Behaviours



## Knowledge

- Knowing your customers
- Understanding the organisation
- Meeting the regulations and legislation
- Systems and resources
- Your role and responsibility
- Customer Experience
- Product and Service knowledge



## Skills

- Interpersonal skills
- Communication
- Influencing Skills
- Personal organisation
- Dealing with customer conflict and challenge
- Understand how to influence customer choice



## Behaviours

- Developing self
- Being open to feedback
- Teamwork
- Equality - treating all customers as individuals
- Presentation - Dress code, professional language
- "Right first time"



# Gateway and EPA

## EPA Weighting

Apprentice Showcase

65%

Practical Observation

20%

Practical Discussion

15%



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.

### Apprentice Showcase

The apprentice showcase is compiled after 12 months of on-programme learning. The Apprentice Showcase enables apprentices to reflect and present examples of their development over the whole on-programme period. With guidance from the employer and/or training provider the apprentice will select appropriate evidence from the on programme portfolio to demonstrate the minimum requirements of the standard at the final stage of the programme as an 'Apprentice Showcase'. This will attest to professional competence at the level.

### Practical Observation

The practical observation will be pre-planned and scheduled to when the apprentice will be in their normal place of work and will be carried out by the Independent Assessor. The observation should enable the apprentice to evidence their skills, knowledge and behaviour from across the standard to demonstrate genuine and demanding work objectives. 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 and personal organisation. Those areas of the standard which are not able to be evidenced during the observation will be discussed subsequently as part of the professional discussion with the Independent Assessor.

### Practical Discussion

The professional discussion will be a structured discussion between the apprentice and the Independent Assessor, following the observation, to establish the apprentice's understanding and application of knowledge, skills and behaviours. The professional discussion will need to take place in a suitable environment and should last for a maximum of one hour. The discussion will be against set criteria in the occupational brief to ensure standardisation and consistency. It will be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence. Please see Appendix A at the end of this Assessment plan for the Occupational brief.

# 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



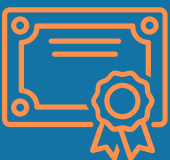
Specialist Support



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

[www.suttondistricttraining.co.uk](http://www.suttondistricttraining.co.uk) || [enquiries@suttondistrict.co.uk](mailto:enquiries@suttondistrict.co.uk)

