

catch
22



CUSTOMER SERVICE SPECIALIST

LEVEL 3


Ofsted
Good
Provider

CUSTOMER SERVICE SPECIALIST

LEVEL 3

This apprenticeship trains you to provide excellent customer service and can be applied to hundreds of job roles across many different sectors.

Apprentices working towards this level are likely to be in the following roles:

- Customer relations manager
- Coordinator
- Team leader

The duties of the apprentice will vary across the business type they are working in, but they will include being an advocate for customer services and acting as a referral point for dealing with more complex or technical customer requests, complaints and queries. The apprentice will be an expert in the organisations products and services and share knowledge with the wider team. The role will involve gathering and analysing data with the ability to influence change and improvements to services.

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ENROLMENT TIMELINE

Catch22 Apprenticeships believe in “right learner, right course”. By that we mean it is crucial that all apprentices are accurately matched to an apprenticeship programme that suits their job description, their prior learning and ability to achieve all aspects of the course. Therefore, the below steps will be followed to confirm the eligibility of everyone who wishes to enrol upon one of our apprenticeship programmes:



Potential apprentice is emailed a link to complete Initial Assessments for Maths & English. Then a Skill Scan is completed with the potential apprentice and the employer, which can be done either online or in person. These assessments determine the eligibility for the apprenticeship to proceed.



If eligible, all enrollment documentation is completed by the employer and apprentice.



The apprentice is invited to attend an Induction Session, which is delivered by one of the Apprenticeship Training team via Microsoft Teams.



Learning then commences from the date of the apprentice's attendance at the Induction Session.

YOUR JOURNEY

CUSTOMER SERVICE SPECIALIST LEVEL 3

These learning topics will be delivered via webinar sessions with your trainer. They will be via the Microsoft Teams platform and will be a maximum of two hours.



REMOTE 1-1 or a FACE to FACE

These sessions will occur each month and will be delivered either remotely via Teams or in person at the Apprentice's workplace. They will last between 1 and 3 hours.

CUSTOMER SERVICE SPECIALIST LEVEL 3

Month	Session Title	Session Contents	Self-Learning
1	Welcome to your Apprenticeship Personal Development & Presentation	<ul style="list-style-type: none"> Explanation of Apprenticeship & Delivery Types Functional skills explanation (Initial assessments - BKSB) Cognassist Equality & Diversity and Inclusion Online Safety First session of learning – <ul style="list-style-type: none"> - SWOT Analysis - Behavioural styles - SMART Targets and creating a PDP - Smart targets and creating a PDP which considers goals related to service and how you will keep industry knowledge up to date. 	<ul style="list-style-type: none"> Complete OneFile courses: <ul style="list-style-type: none"> - Learner Induction Course - Online Safety Course - Time Management Course Self-Assessment - SWOT Analysis Learning Styles (Onefile Induction Course) Personal development plan
2	Business Knowledge and Understanding	<ul style="list-style-type: none"> Understand organisational strategy Understand your business environment and culture and the position of customer service within it Understand your organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong 	<p>Tasks</p> <ul style="list-style-type: none"> Mission Statement\ company values Business Culture Business Structure Continuous change <p>Knowledge statement</p> <ul style="list-style-type: none"> Organisational Strategy
3	The Customer Journey	<ul style="list-style-type: none"> Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience. Identify where highs and lows of the journey produce a range of emotions in the customer Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction <p>Progress Review</p>	<p>Task</p> <ul style="list-style-type: none"> Organisational Delivery Standards Reputation and position Market Place and Competitors <p>Knowledge statement</p> <ul style="list-style-type: none"> Commercial factors that affect service delivery. Professional image in the work place and its impact on the business <p>Assessment Activity</p> <ul style="list-style-type: none"> Challenging conversations Observation
4	Communication in the workplace	<ul style="list-style-type: none"> Understand questioning, listening and summarising negotiate mutually beneficial outcomes Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes Understand verbal & written communication to support and provide complex information Ensure personal presentation, in all forms of communication, reflects positively on the organisations brand. 	<p>Assessment activity</p> <ul style="list-style-type: none"> Diary of complaints showing ; <ul style="list-style-type: none"> - Problem solving - Negotiating skills <p>Communication methods</p>

5	Knowing your customers and their needs	<ul style="list-style-type: none"> Know your Internal and external customers and how their behaviour may require different approaches from you Understand what drives loyalty, retention and satisfaction and how they impact on your organisation Understand different customer types and the role of emotions in bringing about a successful outcome Understand and analyse how customer expectations can differ between cultures, ages and social profiles and anticipate their potential needs and expectations when providing your service Demonstrate a cost conscious mindset when meeting customer and business needs Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment 	<p>Assessment activity</p> <p>Research data from your organisation with regards to customer satisfaction. Identify trends and propose solutions. To be delivered as a 10 minute Powerpoint presentation in the next session.</p> <p>Knowledge Statement</p> <ul style="list-style-type: none"> Internal and external customers Approaches to support a positive outcome
6	Service Improvement & Data Analysis	<ul style="list-style-type: none"> Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implications and facts and act upon it Understand qualitative and quantitative customer experience data that your organisation gathers Understand how to analyse, use and present a range of information to provide customer insight Understand data analysis to recommend continuous improvement Analyse the end to end service experience seeking input from others where required supporting development of solutions <p>Progress Review</p>	<p>Assessment activity</p> <ul style="list-style-type: none"> Research and obtain Qualitative and quantitative customer experience data Gathering qualitative and quantitative data and analysis of how this can be used to influence improvement Contract cycle, value, contract time and resolution rates, numbers and types of complaints. Analysis of where potential improvements could be made or recommendations of how they could be made <p>Knowledge statement</p> <ul style="list-style-type: none"> Leadership Styles & managing change Identify potential change
7	Analyse and present data	<ul style="list-style-type: none"> Understand how to analyse, use and present a range of information to provide customer insight Understand what drives loyalty, retention and satisfaction and how they impact on your organisation 	<ul style="list-style-type: none"> Apprentices to deliver presentation to the group set last session Peer and tutor feedback to each apprentice after the presentation
8	Customer insight - conflict	<ul style="list-style-type: none"> Understand how to Managing Conflict Situations Managing challenging & complicated situations Understand Transactional Analysis Providing Feedback Maintain a positive relationship even when you are unable to deliver the customers expected outcome 	

Month	Session Title	Session Contents	Self-Learning
9	Customer service culture and Environment Awareness	<ul style="list-style-type: none"> Understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers Understand current legislation, compliance and regulatory guidance when making recommendations for change. GDPR Understand how to find industry best practice to enhance knowledge When managing referrals take into account historical interactions and challenges to determine next steps <p>Progress Review</p>	<p>Assessment Activity</p> <ul style="list-style-type: none"> Organisational culture Environment awareness <p>Knowledge Statement</p> <ul style="list-style-type: none"> Organisational cultures Organisational Structures <p>Observation</p>
10	Business focused service delivery	<ul style="list-style-type: none"> Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice Resolve complex issues by being able to choose from and successfully apply a wide range of approaches Find solutions that meet your organisations needs and customer requirements Understand continuous improvement in a service environment. Make recommendations and implement where possible changes in line with relevant legislation, regulations and industry best practice Understand the impact your service provision has on the wider organisation and the value it adds Understand the principles and benefits of being able to think about the future when taking action or making service related decisions 	<p>Assessment Activity</p> <ul style="list-style-type: none"> Customer feed back data collection <p>Observation</p> <p>Knowledge Statement</p> <ul style="list-style-type: none"> Legislation, regulatory guidance and its impact on decision making <p>Assessment Activity</p> <ul style="list-style-type: none"> Legislation and regulations which apply to your organisation and impact delivery of customer service
11	Team Work, Equality & Developing Self	<ul style="list-style-type: none"> Work effectively and collaboratively with colleagues at all levels to achieve results Recognise colleagues as internal customers Understand a range of leadership styles and apply them successfully in the customer service environment Share knowledge and experience with others to support colleague development 9 Protected Characteristics Review of Personal Development Plan 	<p>Assessment Activity</p> <ul style="list-style-type: none"> Observation Sharing knowledge Coaching colleagues <p>Knowledge Statement</p> <ul style="list-style-type: none"> Equality & Diversity <p>Assessment Activity</p> <ul style="list-style-type: none"> Witness Testimony

12	Project Planning	<ul style="list-style-type: none"> Project Aim Project Scope Stakeholder <p>Progress Review</p>	<p>Assessment Activity</p> <ul style="list-style-type: none"> Develop Practice project plans
13	Career Progression & Your Future	<ul style="list-style-type: none"> Careers Advice & Guidance 	<ul style="list-style-type: none"> Review of Personal Development Plan
14	Gateway and EPA Prep	<ul style="list-style-type: none"> Roles and Responsibilities Support & EPA Health-checks The pre-Gateway review The Gateway, including: The CMI EPA Portal (Skilsure) Information needed, including Employer & Apprentice contact details and uploading documents into Skilsure Timelines and roles post-Gateway 	<ul style="list-style-type: none"> Gateway meeting with Employer/Apprentice, Mock Test Scenarios Revision Guidance and resources Mind maps and revision techniques
15	Gateway and EPA Prep	<ul style="list-style-type: none"> Mock EPA Professional Discussion Review of EPA Presentation compilation Check in on how Apprentice is feeling on EPA Completion of Exit Survey Meeting with manager to confirm Gateway and evidence Review session 	
16 - 18	EPA		

END POINT ASSESSMENT INFORMATION

WHAT IS GATEWAY?

Gateway is triggered when the apprentice has achieved all knowledge, skills and behaviours set out in the assessment plan, has been on programme for a minimum of 1 year and 1 week and the apprentice, employer and training provider feel the apprentice is ready for their EPA. The gateway period is roughly 3 months, and this allows the apprentice to prepare and agree a date with the EPAO to when the assessment will take place.

Note: Gateway can only be achieved once the following has been met.

English and Maths at Level 1 (or equivalent) and Level 2 to be attempted

Completion of knowledge, skills and behaviours

Minimum of 20% OTJT recorded

Gateway declaration signed by apprentice, line manager and apprenticeship trainer



WHAT IS END POINT ASSESSMENT?

End Point Assessment (EPA) is made up of a range of synoptic assessments which are completed at the end of the apprentices' programme, once they have achieved gateway requirements. EPA takes place to ensure the apprentice has the knowledge, skills and behaviours outlined in the apprenticeship standard in order to be occupationally competent.

Assessments have been designed by employers in the sector and will be conducted by an Independent End Point Assessor (IEPA) who works for an End Point Assessment Organisation (EPAO). All assessments must be passed for the apprentice to achieve. There are 3 available grades for this standard; **fail, pass and distinction**.

Assessments which form EPA activities –Customer Service Specialist Level 3

Apprentice Showcase	2500 written report.
Practical Observation	60-minute observation of apprentice duties.
Professional Discussion	60-minute structured discussion.

Completion of this apprenticeship will lead to eligibility to join the Institute of Customer Service as an Individual member at Professional level. Should you choose to progress on a customer service career path, you may be eligible for further professional membership including management.



DELIVERY TYPES:



WEBINARS

These will be delivered via the Microsoft Teams platform and will be a maximum of 2 hours. They may be delivered on an individual basis or with a group of apprentices. The trainer will deliver a session on a particular topic and you will have the opportunity to have input through discussion and the use of the in-platform chat facility. These webinars will provide you with learning that counts towards your off the job training and will also provide you with tasks to complete for your apprenticeship learning. Please note that webinars will be recorded and be stored securely on Onefile to evidence your learning and participation.



1:1 SESSIONS

These will be either face to face or carried out remotely via Microsoft Teams. They will provide you with dedicated time with your trainer to discuss your progress towards achieving your apprenticeship and any aspects where you may feel you need extra support or guidance. Your trainer will also provide you with feedback on any work that has been set and guide you towards the next steps in your apprenticeship programme. Your trainer can also guide you towards additional resources that stretch your knowledge and understanding of relevant topics. Off the job training will also be reviewed to make sure you are on track to meet the minimum 20% requirement. All other work set will be reviewed and any additional support provided if needed. If any assessments are planned to take place during the 1:1 visit these will be recorded and added to your OneFile portfolio as evidence towards completion of your apprenticeship.



PROGRESS REVIEWS

These can either be face to face or remote and will require the involvement of your line manager. The reviews take place at least every 12 weeks and is intended to provide an update on progress towards completion of your apprenticeship. Your manager will provide their input in order to make sure that the apprenticeship is meeting the needs of your employer and that you are gaining the skills, knowledge and behaviours to improve your working practices. Targets will be set for completion of varying tasks, which can include developing softer skills or enhancing your maths, English and digital skills. Reviews are usually recorded and then stored on OneFile.



ONEFILE ONLINE COURSES

These online courses are designed to provide essential knowledge information to continue to stretch and challenge you throughout the apprenticeship. They are designed to be completed in your own time and will have knowledge checks for each. These courses can also contribute to your apprenticeship standard in conjunction with work set by your trainer. They will help build your knowledge and can expand your understanding of the industry, as well as contributing to your off the job training.

*Please note that any webinars, 1:1 meetings and progress reviews will be recorded, and securely saved and stored to your OneFile account, where only you, your manager and Catch22 staff involved in your training can have access. These will not be shared outside of OneFile without your permission.

Group webinars will also be recorded and made available as a resource on OneFile. Other apprentices may access these files if they are unable to attend the live sessions.

SYSTEMS

OneFile is the e-portfolio for your Apprenticeship. This is where you will store your evidence, log your 20% off-the-job-training, and track your progress towards achievement. Gone are the days of ring binders and plastic wallets, this is your one stop shop for Apprenticeship programmes.



For the duration of your Apprenticeship, you will be given an Microsoft365 account, which provides you access to a wide range of Microsoft Office applications such as Outlook, Word, Excel and the Teams collaboration and communication tool. Teams will be integral to how you will engage and communicate with your trainer and take part in online webinars with other apprentices. You will be provided with a separate user guide to support you in setting this amazing tool up.



BKSB is a web based platform used to obtain initial assessments and diagnostic assessments on English and Maths which then provide an individual learning plan on how to fill learners' skills gaps. Our trainers use BKSB to support one-to-one learning to improve English and Maths skills no matter what apprentices previous achievements in these subjects are. Independent learning on BKSB is encouraged to allow apprentices to work at their own pace through learning resources, skills checks and revision scenarios.



NEXT STEPS...

Following successful completion of your apprenticeship, you will be able to progress to the following:

- Team leading apprenticeship
- Operations/departmental manager apprenticeship

On completion of this apprenticeship you will be eligible to join the Institute of Customer Service as an Individual member at Professional level. Should you choose to progress on a customer service career path, you may be eligible for further professional membership including management.

INTERESTED?

If you are interested in starting your apprenticeship journey? Please contact us at
apprenticeship@catch-22.org.uk



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