Observations within the Customer Service Practitioner and Customer Service Specialist End Point Assessment

October 2022

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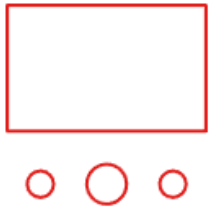
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Questions

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Speakers



Dom Green

Technical Advisor
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EPA Partnership Manager

Agenda

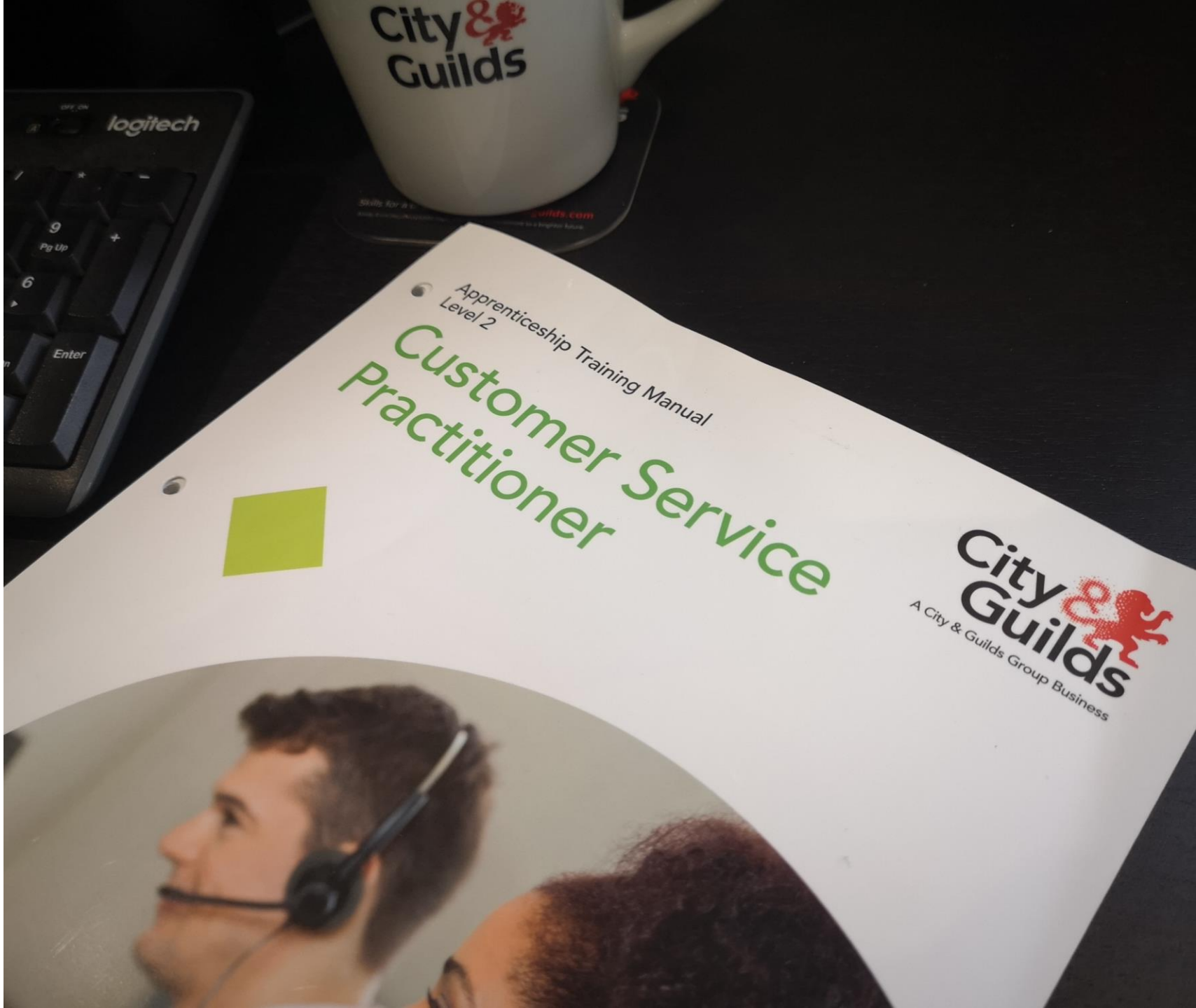
Overview of the EPA observations

LIEPA feedback

Pass V Distinction

Remote invigilation

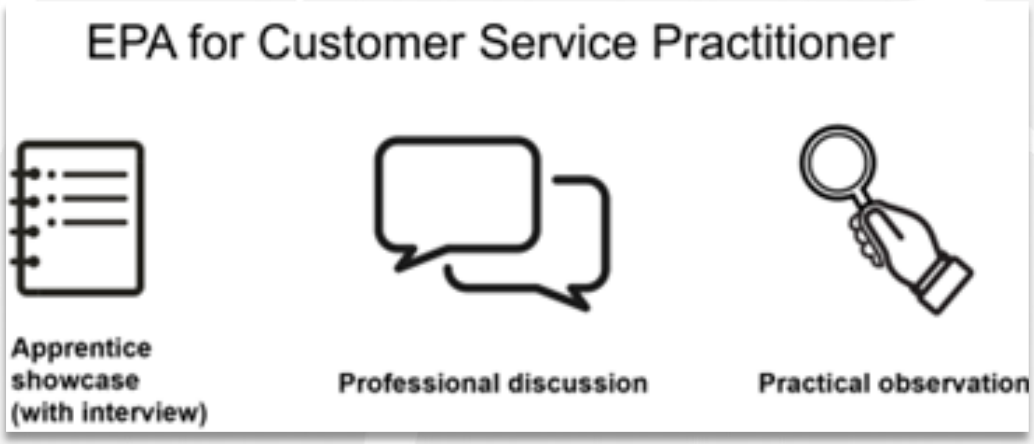
Q&A





Overview of the EPA observation requirements

Observation overview for level 2 & 3 EPA



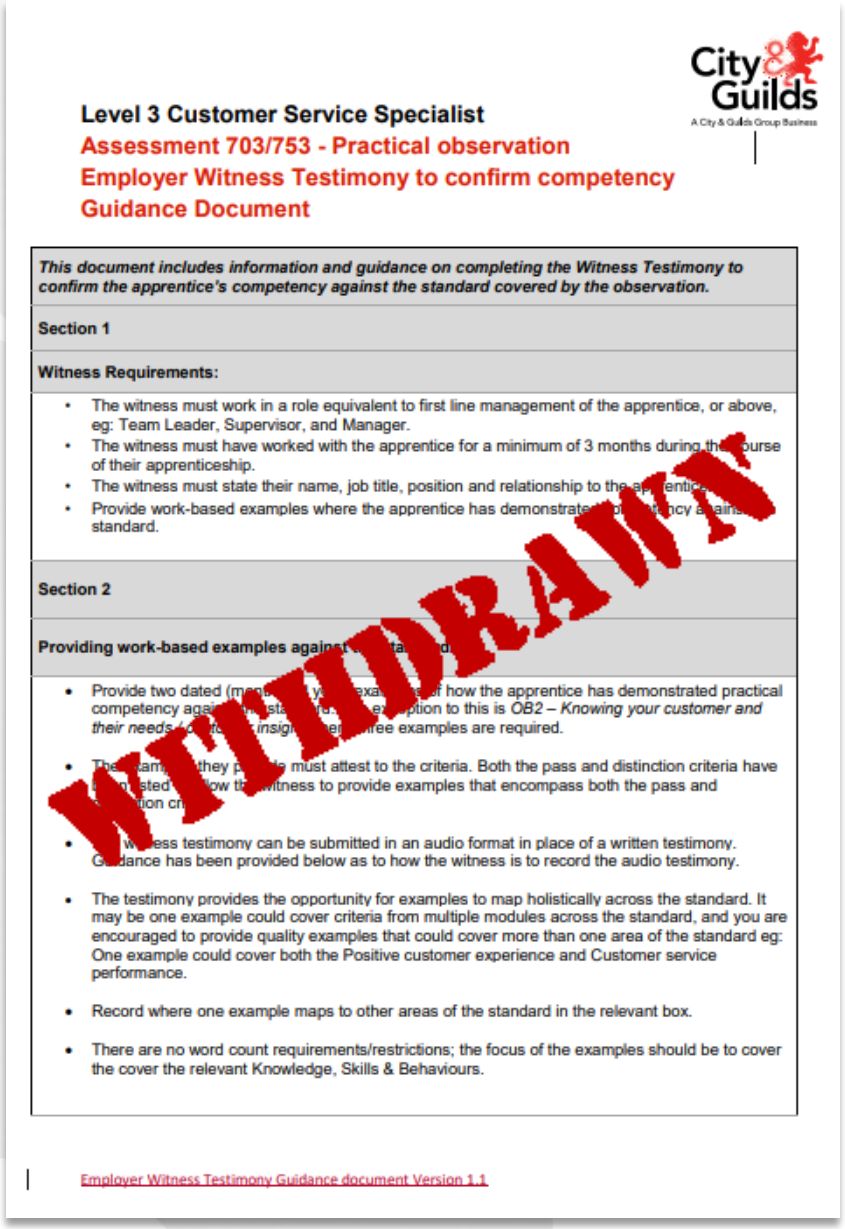
- Interpersonal skills
- Communication
- Equality – treating all customers as individuals
- Presentation – dress code, professional language
- Right first time



- knowing your customers and their needs/customer insight
- customer service culture and environment awareness
- business focused service delivery
- providing a positive customer experience
- customer service performance
- ownership/responsibility
- team working
- equality
- presentation

Observation Dispensation

IfATE have withdrawn the dispensation



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Level 3 Customer Service Specialist
Assessment 703/753 - Practical observation
Employer Witness Testimony to confirm competency
Guidance Document

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

Section 1

Witness Requirements:

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

Section 2

Providing work-based examples against

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

Employer Witness Testimony Guidance document Version 1.1

A focus on Customer Service Specialist

The practical observation must be carried out on a one-to-one basis with the IEPA and:

- reflect typical working conditions
- allow the apprentice to demonstrate interaction with at least three customer types NB: This is just for PASS
- be at a day and time when the apprentice will have opportunities to handle a range of customers and issues
- be in the right environment with enough space and resources for the apprentice to be able to do their job.
- take a synoptic approach to assessment of overall competence.

A focus on Customer Service Specialist

• allow the apprentice to demonstrate interaction with at least three customer types

Standard module	Ref	Assessment requirement	Pass descriptors
Knowing your customers and their needs/ customer insight	OB2	Understand different customer types and the role of emotions in bringing about a successful outcome	An ability to assess at **least 3 different customer types** and their role of emotions in order to achieve a successful outcome for them.
			Ability to react appropriately to customer emotions and bring about a successful outcome for **different customer types.**

What is a customer type? We defined '3 customer types' as customers who all have **varying needs** to help broaden the scope of customers that could be captured within this definition.

The importance of the level 3 observation

This essentially boils down to **customer interaction**. If the learner has the opportunity to get this bit right it improves the chances of success.

- must include customer interaction
- undertaking a range of day to day workplace activities in the apprentice's workplace
- interaction with at least 3 different customer types (customers with varying needs)
- importance of time of day the observation takes place at
- supplementary Q&A may be carried out to seek further clarification on aspects not seen during the observation **in full** (appropriate environment required)

Duration

Time allowed for Practical Observation

Both the Customer Service standards practical observation will generally last **1 hour**

Please note:

- The practical observation should 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.
- Photographic ID must be shown on the day



LIEPA feedback – Level 3 Customer Service Specialist Observation

LIEPA Feedback - level 3 CSS



Where Practical Observations have taken place, apprentices are well presented, professional and display the attributes and qualities expected of a Level 3 Customer Service Specialist. However, the apprentice's job role and responsibilities are often not sufficient to enable them to deal with a variety of customer interactions and demonstrate the ability to deal with complex issues using a wide range of approaches.



Practical Observations have not been arranged for a time of day that would provide the apprentice with the best opportunity to deal with a variety of customers to provide coverage of the required criteria.



Apprentice's job roles need to include the scope and breadth to enable them to gather the required evidence and demonstrate the relevant Skills, Knowledge and Behaviours of the Standard.

What can/can't be done?

Will any pre-recorded evidence be able to support the assessment criteria?

No, as per the assessment plan everything assessed should be live,

Can written evidence be considered for the observation assessment?

No, all evidence must be seen during the observation.

Can the Witness Testimony be used in exceptional circumstances?

No, as we know, this has been withdrawn by IfATE therefore:

- Ensure the apprentice is in the correct job role prior to them starting the standard.
  - Carry out a skills scan on the job role itself
  - Discuss this with their line manager, explaining the requirement of the observation (3 different customer types)
- Carry out mock observations on different days/times of the day
- Use internal customers if possible
- Plan/save any tasks which require customer interaction for the day of the observation

Pass v Distinction

Pass v Distinction grades

Example below is from Customer Service Practitioner level 2

Compare the wording in the descriptors table

		PASS	DISTINCTION
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.	

Re-sitting the observation



Resitting the observation

If an apprentice fails the observation, a full re-sit assessing all the KSBs will be required

Driving test approach!

Please note: An apprentice cannot re-sit to upskill their grade.

Remote observation

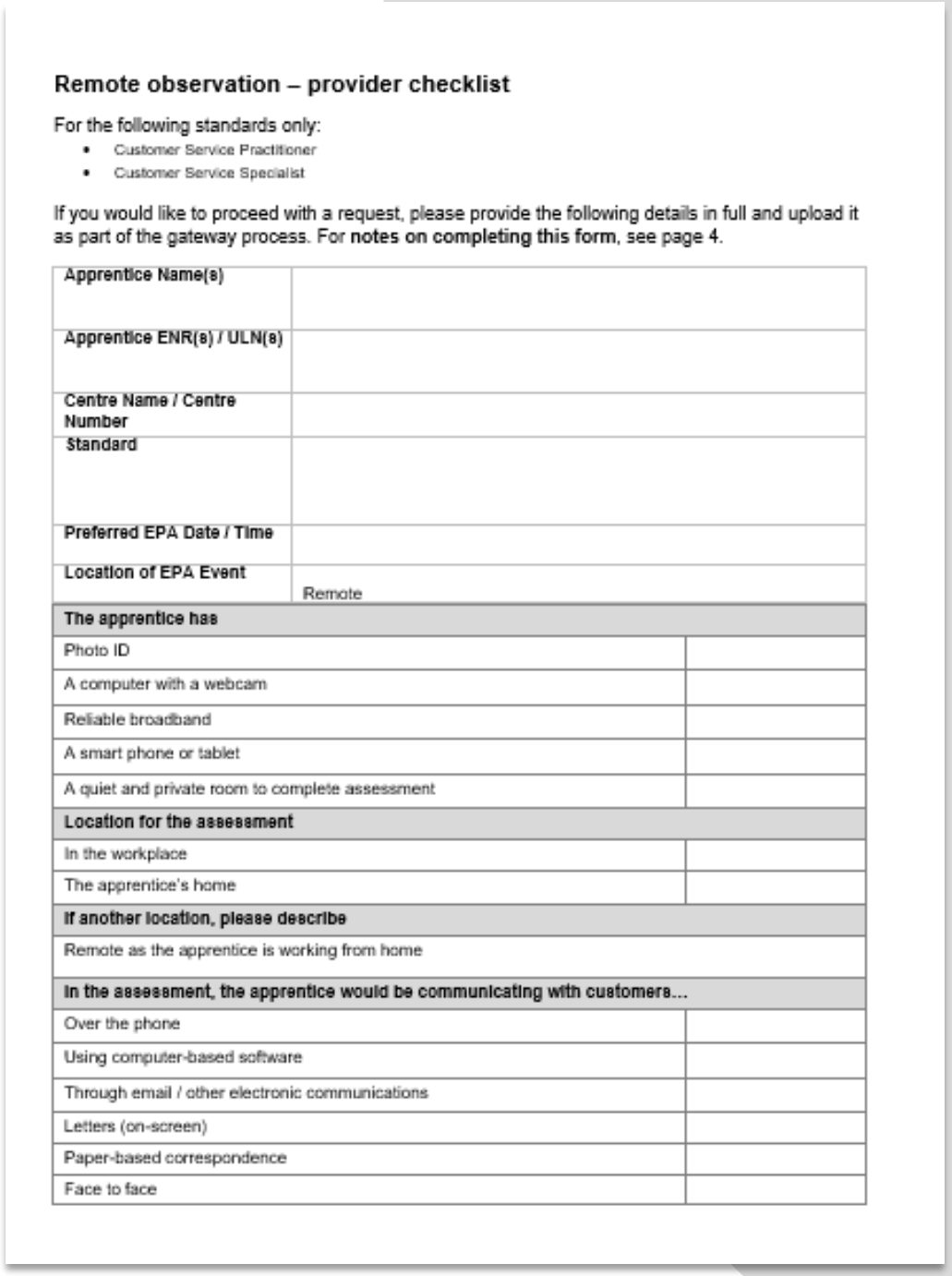


Remote observation

- Apprentices are now able to choose either face to face or remote observation for their End-point assessment.
- Implementation of a robust process to provide the remote observation option for customers
- Customers must upload a fully completed Remote Observation Provider Checklist onto EPA Pro.
  - The checklist form will be available within EPA Pro to download.
  - This will be uploaded alongside the gateway requirements in EPA Pro.
- EPA booking events team will review the checklist and give approval when all requirements have been met. If approval is not given, then face to face must be implemented
- Customers must ensure the apprentice are in their normal work environment (this maybe working from home)

Remote observation

- Checklist



Remote observation – provider checklist

For the following standards only:

- Customer Service Practitioner
- Customer Service Specialist

If you would like to proceed with a request, please provide the following details in full and upload it as part of the gateway process. For **notes on completing this form**, see page 4.

Apprentice Name(s)	
Apprentice ENR(s) / ULN(s)	
Centre Name / Centre Number	
Standard	
Preferred EPA Date / Time	
Location of EPA Event	Remote

The apprentice has	
Photo ID	
A computer with a webcam	
Reliable broadband	
A smart phone or tablet	
A quiet and private room to complete assessment	
Location for the assessment	
In the workplace	
The apprentice's home	
If another location, please describe	
Remote as the apprentice is working from home	
In the assessment, the apprentice would be communicating with customers…	
Over the phone	
Using computer-based software	
Through email / other electronic communications	
Letters (on-screen)	
Paper-based correspondence	
Face to face	

Remote observation

Notes on completing this form

The provider must have the technology to support the type of customer service role the apprentice has. The table below shows what the mandatory and optional requirements are for different types of customer service:

Area	Phone	Computer-based software	Email / electronic comms	Letters (on-screen)	Paper-based correspondence	Face to face
Photo ID	M	M	M	M	M	M
Reliable broadband	M	M	M	M	M	M
Quiet and private room for assessment	M	M	M	M	M	M
Apprentice confident using meeting software	M	M	M	M	M	M
Apprentice's screen can be shared	O	M	M	M	O	O
Customer phone calls can be shared	M	N/A	N/A	N/A	N/A	N/A
Camera allows IEPA to see face to face interactions with customers	N/A	N/A	N/A	N/A	N/A	M
Webcam	M	M	M	M	M	M
Second camera	O	O	O	O	M	M

Key: M – mandatory, O – optional, N/A – not applicable.

For example: if the apprentice is responding to customer phone calls, the IEPA will need to hear those phone calls, but they won't need to see face to face interactions. Seeing the apprentice's screen may help the IEPA assess their performance, depending on the circumstances.

Remote observation

- All customers for 9794-12 Customer Service Practitioner standard can now submit their remote observation provider checklist for consideration, EPA events can be allocated using the remote option from **Monday 24th October 2022.**

- Currently we are running a **pilot** for any remote observation requests for apprentices on 9494-12 Customer Service Specialist Level 3 standard. This standard is more complex in its assessment requirements and therefore we will continue to carefully manage and monitor remote End-point assessments within this pilot until further notice.

Remote observation
Things to consider….

Will consent be needed form 3rd party customers who will take part in the observation*?*

Consent must be sought and retained from any relevant clients, customers or employers **prior** to remote assessment taking place

What technology will be required by the customer?

The customer will need to ensure they have access to Go to Meeting software.

Does the IEPA need to see and hear the apprentice?

Yes, the IEPA must be able to see and hear the apprentice.

Does the IEPA need to hear any customers the apprentice interacts with?

Yes, this is mandatory.

Is homeworking their normal way of working?

If so, we would recommend a remote observation

Remote observation issues

- The remote observation will not work for every apprentice.
  - Job role specific
  - Home workers

Current known issues:

- The apprentice not testing their device prior to EPA
  - Be able to share their screen
  - Ensure both the customer and apprentice can be heard
- Logistics – if the apprentice requires to be mobile, the set up must allow for this
  - e.g. an apprentice working on a service desk moving around
- Know they must move to an area suitable to undertake the other two assessment components.
  - A quiet room is required
  - The portfolio (and Q&A) and PD are recorded. The observation is not due to GDPR


Any Questions?

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