



**The British Institute
of Recruiters**



**Accredited
Course** ✓

Customer Service Practitioner Level 2

ST0072/AP02



About Us

The British Institute of Recruiters (BloR) is a British Institute representing the highest standard mark in British recruitment. As the professional body for HR, Agency & In-House recruiters, it is the voice of people working in the recruitment and retention process that fall into the areas of agency recruitment, corporate (in-house) recruitment and HR.

What we do

The BloR provides British Recruitment Best Practice Guidance, Training, Education & Networking to Agency Recruiters, In-House Recruiters & HR teams with unrivalled services and innovation. Bringing HR, Agency & In-House specialists under a single body is essential for positive collaboration towards the common goal of an efficient, seamless process.

Why choose the BloR for your apprenticeships?

- Content specific to managing in a recruitment environment – real life recruitment case studies and examples
- Practical tools and techniques that are proven to transform results and increase agency revenue
- Supported by a team of experts from the recruitment industry with experience of managing recruitment teams

Our professional industry accreditations include

Recruitment Director Accreditation
mBloR DIR

Individual Professional Accreditations
mBloR, Cert PRP, Cert HR, Dip BloR

Company Accreditations
Certified Recruitment Business & Professional Recruitment Business

Our professional courses are delivered in many ways to suit you

Private Distance Learning, Blended Classroom Learning, Apprenticeships, Government Loan Funded.

Course Prospectus includes Recruitment, Management, HR, Sales & Marketing, Back Office & Finance.

Chartered status

The British Institute of Recruiters is actively lobbying to introduce Chartered Status in British Recruitment, creating Chartered Recruitment Businesses.

How Apprenticeships Are Delivered

1

Discussions

With the employer to assess their needs and advise on the right program to fit the business needs. Discussion with the apprentice to advise and guide on the appropriate course and levels.

2

Enrolment & Agreements

Paperwork that is signed and sets out all expectations. At this stage, we advertise the apprenticeship roles on the government site if the business needs to hire.

3

Initial Assessments & Diagnostics

To establish levels of competency and needs including functional skills support and the favoured learning style.

4

Plan the Program

Create an individual learning plan that meets the needs of the learner and business. Include where needed components such as bespoke content (including existing client training materials), on site training, webinars, face to face tutorials and virtual visits.

5

Technology

Get your own bespoke study area on our professional learning platform. The British Institute of Recruiters runs the state of the art learning platform called StudyCourse. Use StudyCourse to access learning materials, resources, assignments, upload achievements and more. Employers can also track learner progress.

6

Monthly Tutor Visits

Each month the tutor will visit the learner to teach, support and advise, making the learning experience exciting and individual. Visits can be face to face or virtual using GoToMeeting and other technologies.

7

End Point Assessment (EPA)

For Apprenticeship Standards, End Point Assessment is carried out by an independent organisation. Our professional tutors will get you ready for EPA.

8

Achievement

Our achievement success rates are excellent as we ensure we provide a quality learning experience that is highly valued by employers.

9

Professional Registration & Progression

For recruitment, The British Institute of Recruiters is the body that provides Professional registration and post-nominal letters as well as professional membership - mBIoR.

Level 2 Customer Service Practitioner

Role / Occupation:

Customer Service Practitioner

Occupational Profile:

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.

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.•



Knowledge	What is required
-----------	------------------

- | | |
|-------------------------------|---|
| 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 customer needs and expectations and achieves positive engagement and delivery. |
| Communication | <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• Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions. |
| 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

- 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

- Treat customers as individuals to provide a personalised customer service experience.
- Uphold the organisations core values and service culture through your actions.

Presentation – dress code, professional language

- Demonstrate personal pride in the job through appropriate dress and positive and confident language.

“Right first time”

- 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.

Duration

The apprenticeship will take a minimum of 12 months to complete.

Entry requirements

Apprentices will be required to have or achieve level 1 English and Maths and to have taken level 2 English and Maths tests prior to completion of their Apprenticeship.

Link to professional registration

Completion of this apprenticeship will lead to eligibility to join the Institute of Customer Service as an Individual member at Professional level.

Level

This apprenticeship standard is set at Level 2

Review

The apprenticeship should be reviewed after a maximum of 3 years.

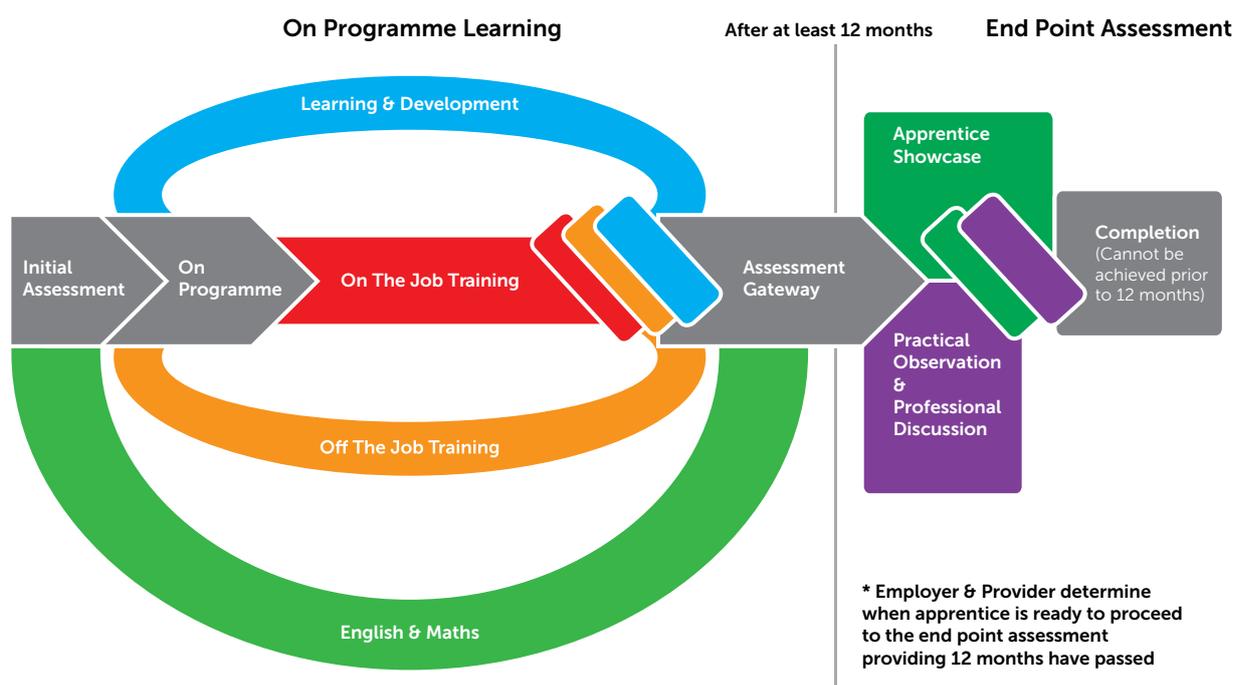
End Point Assessment Plan

Introduction

This document sets out the requirements and process for the end point assessment of the Customer Service Practitioner Level 2 apprenticeship. It is designed for employers, apprentices, training providers and assessment organisations.

Summary of Assessment

This should be read in conjunction with the standards. The whole programme will be completed in no less than 12 months. In agreement with the apprentice, employer and provider, the apprentice may start the end point assessment at the earliest after 12 months on programme.



On-Programme Learning

The period of learning, development and continuous assessment is managed by the employer, in most cases with the support of a training provider. The on-programme pace will be driven by individuals as well as by the breadth of experience an employer can offer prior to the minimum of 12 months after which end-point assessment will take place.

Employers should work closely with any training provider to plan and deliver support and training appropriately. This working closely will add value to the employer as it centres on real work competencies demonstrated in a real work environment.

To drive quality and consistency through on-programme learning employers may wish to consider the following

- **Use of their normal performance management processes to monitor the progress of the apprentice, provide feedback and guide development.**
- **Training providers may support ensuring the requirements of the apprenticeship standard are reflected in the above processes, and by filling any gaps through their work with apprentices.**
- **Employers and training providers could carry out joint reviews of progress at regular intervals, involving apprentices, line managers and others with a direct relationship, e.g. mentors, workplace coaches, etc. They should agree how any issues are to be resolved together.**
- **Apprentices may develop and maintain examples of their work throughout their apprenticeship that cover the full standard. This could be in the form of a portfolio or other tracking method to be reviewed on-programme at intervals agreed by the employer and training provider, for example at 3, 6 and 9 months.**

Assessment Gateway

The end point assessment is synoptic and takes place at the end of the apprentice's learning and development, after a minimum of 12 month's on programme learning.

The employer, and, if appropriate in conjunction with the Training Provider, will formally sign-off that the apprentice has met the minimum requirements in regards to knowledge, skills and behaviours within the standard and confirm they are ready to move on to the end assessment. This will happen during a meeting involving the apprentice, their line manager and the trainer.

End Point Assessment

For each of the three assessment methods, all pass criteria (100%) must be achieved to progress and complete the apprenticeship programme, as outlined below.

For a distinction to be awarded, apprentices must also achieve a distinction in each assessment method, as outlined below.



Assessment Method	Weighting	Duration	To achieve a pass	To achieve a Distinction
Apprentice Showcase	65%	After a minimum of 12 months on-programme learning	100%	You must meet all of the pass criteria AND 70% of the distinction criteria
Practical Observation	20%	Minimum of 1 hour	100%	You must meet all of the pass criteria AND 80% of the distinction criteria
Professional Discussion	15%	1 hour	100%	You must meet all of the pass criteria AND 75% of the distinction criteria

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.

The apprentice showcase will be reviewed and assessed by the independent assessor. The evidence contained in the apprentice showcase will be assessed against the following areas of the standard as highlighted in Appendix A:

- **Understanding the organisation**
- **Meeting regulations and legislation**
- **Systems and resources**
- **Product and service knowledge**
- **Influencing skills**
- **Personal organisation**
- **Dealing with customer conflict and challenge**
- **Developing self**
- **Being open to feedback**
- **Team working**

Employers within the sector have strongly expressed that end point assessment methods should be flexible, and where possible delivered virtually due to the impact of demand fluctuation on the quality of customer service within the sector. The apprentice showcase, as agreed by the employer and apprentice with the assessment organisation, can therefore be assessed face to face or remotely. It can be showcased by the learner through the delivery of a presentation or by a virtual form of assessment such as submission of a report, storyboard, journal etc to the assessment organisation.



The apprentice showcase will be assessed against an externally set brief, written by the assessment organisation, working with Employers and other stakeholders, as appropriate, to ensure consistency.

It is expected that the externally set brief will include elements such as work-based evidence, including customer feedback, recordings, manager statements, and witness statements. It will also include evidence from others, such as mid-and-end of year performance reviews, and feedback. It is important to acknowledge that the employer and training provider will work together throughout the on-programme learning, ensuring all learning is consistently applied throughout the Apprenticeship and not just at the End Point Assessment or in the Apprentice Showcase. The apprentice will then present to the Independent Assessor to provide an opportunity for them to interview the apprentice and delve deeper in to the learning and experience. This is to ensure rigor, competence and independence.

Practical Observation & Professional Discussion

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

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.

Professional 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.

The purpose of the professional discussion is to:

- **clarify any questions the Independent Assessor has from their assessment of the learner journey 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;
- provide a basis for the Independent Assessor to make a decision about the grade to be awarded.

The Independent Assessor will plan the professional discussion in advance and in conjunction with the apprentice and employer. It will follow the occupational brief which will be subject to internal and external quality assurance, as described in section 9.

The professional discussion will be graded by the Independent Assessor based on the standard and grading criteria. Final judgement and the overall grade for the apprenticeship will be made by the Independent Assessor following completion of both the practical observation and professional discussion.

Independence

The assessment decisions need to be taken by Independent Assessors. To ensure consistent and reliable judgements the Independent Assessor must meet the following criteria:

- understanding of the customer service sector and of the role covered by the apprenticeship
- current occupational competence of 2 years or more
- no direct relationship with the apprentice
- hold or working towards a qualification to undertake assessment and verification activity (i.e. PGCE, Cert Ed or Assessor/Verifier qualifications) and/ or have significant knowledge and expertise in providing consistent and appropriate judgements of a candidate's skill and ability

Summary of roles and responsibilities

Assessor	Role
Employer	<ul style="list-style-type: none"> • Brings a view of the apprentice working with them in the workplace through the apprenticeship • Works with the training provider to carry out a continuous review of the evidence generated by the apprentice as part of the on-programme assessment process • Supports 'on the job' training and offers relevant experience • Decides on the timing of final assessment with the support of the Training Provider
Training Provider (This function could be undertaken by the Employer)	<ul style="list-style-type: none"> • Brings a view of the apprentice from supporting them through the apprenticeship • Works collaboratively with the employer on the behaviours of the apprentice • Delivers 'off the job' training • Works with the employer and undertakes assessment of the apprentice against the standards as part of the on-programme assessment process • Supports the employer on deciding the timing of final assessment
Independent Assessor	<ul style="list-style-type: none"> • Provides an independent view as they will not have had any prior involvement with the apprentice • Brings added rigor and consistency to the assessment through their wider industry perspective, knowledge and experience • Assesses all components of the final end assessment independently using externally set marking/grading criteria • Participates in regular standardisation events
Independent Assessment Organisation	<ul style="list-style-type: none"> • Designs and offers the end assessments • Sources, allocates and manages the Independent Assessors • Runs standardisation events with Independent Assessors • Provides internal/external verification to ensure consistency of assessment decisions

End-Point Grading

The apprenticeship includes Pass and Distinction grades which are applied at the end point assessment with the final grade based on the performance in the apprentice showcase, the practical observation and a professional discussion.

A pass apprentice will competently perform their role demonstrating application of the knowledge, skills and behaviours against the whole standard in line with organisation and regulatory requirements and ensuring customer satisfaction. At a minimum they must meet all criteria as set out in Annex A.

A distinction apprentice, in addition to meeting the pass criteria, will consistently perform above the required level for the role, please refer to Appendix A.

If any part of the assessment is not sufficient when first submitted, there will be an opportunity for resubmission, or observation or professional discussion to be repeated, however multiple assessment opportunities are not expected; all parties should be confident that the apprentice is ready to start the end point assessment with practice runs taking place before formal assessment is completed. Should the Apprentices fail any part of the end point assessment further development must be provided prior to a re-take. If the apprentice re-sits with no additional learning the individual employer will be responsible for bearing the cost.

The final grade will be based on the final end assessment. The apprentice must achieve the minimum pass threshold in each of the end assessment components and will be awarded a final grade based on the weighted average of these end assessment components.

End-Point Grading

Internal Quality Assurance

Approved Independent Assessment Bodies (IAB) must have in place a robust mechanism for internal quality assurance. This should include the ongoing monitoring and support of the independent assessment team, including regular standardisation meetings. Standardisation meetings should be undertaken annually to ensure the assessment system is consistent and reliable.

Internal quality assurance must be completed by an appropriately qualified person, and that person must not have been involved in any aspect of the delivery or assessment of the programme they are quality assuring.

Independent Assessment Organisations who wish to offer end point assessment against the standard will need to be on the Skills Funding Agency's Register of Apprentice Assessment Organisations (RoAAO).

External Quality Assurance:

External Quality Assurance for the end point assessment for this apprenticeship standard will be delivered by Ofqual.

Implementation

Affordability

The cost and practicalities of the assessment have been key considerations in development of the assessment plan due to the range of businesses likely to deliver these apprenticeships. Both large and small employers alike must manage the apprenticeship process within organisations of varying sizes and the assessment needs to be affordable for venues housing small numbers of apprentices.

It is anticipated that the final end assessment costs will be approximately 10% of the total apprenticeship cost.

Expected Starts

Expected Starts	16-18	19+
In the first academic year (Aug '15 to Jul '16)?	4,800	18,500
In the second academic year (Aug '16 to Jul '17)?	5,900	21,000
Per year once fully established?	7,000	25,000

Manageability

Assessment tools will be refined in order to ensure the Apprenticeship Standard criteria are met in a reliable and valid way. We also hope this will encourage small and medium enterprise to take up apprenticeships and to ensure affordability across all employers.

Delivering Consistent (Reliable) Judgements

At the core of ensuring that judgements on role competence are consistent will be the Apprenticeship Standard which defines what is required for each of the Knowledge, Skill and Behaviour areas to be assessed. In addition, Annex A, further expands on the requirements of each area.

Robust marking/grading schemes will be developed by the Independent Assessment Organisations that will be used by all Independent Assessors in the assessment of each of the end assessment components against the outcomes detailed in the Apprenticeship Standard. These will contain detailed guidance on what is required to achieve each assessment component, and what constitutes the different grades.

Consistency of approach by Independent Assessors will be achieved through recruitment, training and standardisation. This will cover an understanding of the overall apprenticeship; knowledge of the detailed standard; the grading standards; examples of relevant evidence and sample marking/grading exercises.