

Learner Journey

Customer Service

Level 2 Customer Service Practitioner

Grading

Please use the following grading terminology:

Pass

Demonstrate the expected knowledge, skills and behaviours against Apprenticeship Standard

Distinction

Demonstrate excellent knowledge, skills and behaviours against the Apprenticeship Standard

The Apprenticeship may not be delivered in this order

| Standard Name: Customer Service Practitioner Level 2 | Enrolment | Month 1 | Month 2 | Month 3 | Month 4 | Month 5 | Month 6 |
|--|---|---|--|---|--|--|--|
| Knowledge & Skills | Induction and programme introduction including: Prior learning discussion Personal objective setting Review skill scans results Start of individual learning plan | Understanding Your Organisation and Developing Self | Meeting Regulations and Legislation | Systems and Resources | Knowing Your Products and Services | Influencing Skills | Personal Organisation |
| Behaviours | Discussed content of the behaviours and how these will be developed, demonstrated and evidenced over the course of the qualification | Observation of practice, demonstrating all aspects of role and responsibilities, including: Interpersonal skills Communication Equality Presentation, dress code and professional language | | | Professional Discussion around: Role and responsibilities Knowing your customers Customer experience | Equality - Treating all Customers as individuals | Observation of practice with distance travelled, including: Right first time - Making initial contact Establishing customer needs from wants Customer expectations and satisfaction Tone and behaviour Remaining positive and professional |
| Group Sessions 2 Hour online workshops | Discussed, agreed and booked | Group session 1 2 hour online workshop: Brand Promise Core Values Service Culture Internal Policies and Procedures Complaints | Group session 2 2 hour online workshop: Legislation Regulatory Requirements Responsibility and Application of Regulations and Legislation | Group session 3 2 hour online workshop: Use of Systems, Equipment and Technology , Measurement and Evaluation Tools to Meet the Needs of Customers | Group session 4 2 hour online workshop: Understanding the Products and Services Available and the Importance of Keeping this Knowledge UpToDate | Group session 5 2 hour online workshop: Purpose Customer Service Customer Needs Customer Priorities Offering Products Handling Customer Objections | Group session 6 2 hour online workshop: Organisation Tools and Skills Prioritisation Meeting Deadlines |
| Additional Group Sessions(as required) E-portfolio (Learning Assistant0 How to Pass EPA Functional Skills | Functional skills initial assessments and diagnostic assessments and session planning for support, as appropriate | | | | | | |
| 1:1 Session Each session to include a feedback section on activities work produced to date and a review of the training plan Face to face to include observations of skills whenever possible | All forward dates of meetings planned, Zoom links issued Discuss Assessment Visit Records (AVR's) and their frequency Demonstrate use of training plan Demonstrate use of Hot Topics and TheLightBulb website First Impressions | SPAG check Identify areas for development from written work produced Training plan review Learning Assistant Training Hot Topic Observation Understanding your role and responsibilities, presentation and dress code | SPAG check Identify areas for development from written work produced Training plan review Learning Assistant Training Hot Topic Communication | SPAG check Identify areas for development from written work produced Training plan review Progress Review Hot Topic Interpersonal skills | SPAG check Identify areas for development from written work produced Training plan review Hot Topic Professional discussion Professional language | SPAG check Identify areas for development from written work produced Training plan review Hot Topic Equality - Treating all Customers as individuals | SPAG check Identify areas for development from written work produced Training plan review Progress Review Observation Respect |
| EPA planning activities | Understanding EPA process | Understanding EPA process Training Plan Review | Understanding EPA process Training Plan review Building showcase portfolio on Learning Assistant | Understanding EPA process Training Plan review Building showcase portfolio on Learning Assistant Progress review | Understanding EPA process Training Plan review Building showcase portfolio on Learning Assistant | Understanding EPA process Training Plan review Building showcase portfolio on Learning Assistant | Understanding EPA process Training Plan review Building showcase portfolio on Learning Assistant Progress review |

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| Standard Name: Customer Service Practitioner Level 2 | Month 7 | Month 8 | Month 9 | Month 10 | Month 11 | Month 12 | Gateway Period | Month 13 |
|--|---|---|---|--|---|---|---|------------|
| Knowledge & Skills | Dealing with Customers Conflict and Challenge | Developing Self | Being Open to Feedback | Team Working | Knowing Your Customers and Customer Experience | Your Role and responsibility | Regular 1:1 coaching and support to ensure learner is at ease with the process and remains in a state of readiness | Reflection |
| Behaviours | | Developing Self | Being open to feedback Professional Discussion | Team Working | Employer/Manager Witness Testimony or Employer Reference Behaviours | Observation Professional Discussion Questioning | | All |
| Group Sessions 2 Hour online workshops | Group session 7 2 hour online workshop: Patience and Calmness Customer's Point of View Sign-posting or Resolution Managing Expectations Maintaining Communication | Group session 8 2 hour online workshop: Keeping Service Knowledge and Skills UpToDate Personal Goals SWOT Reviewing Goals | Group session 9 2 hour online workshop: Seek Feedback Response Positively Act on Feedback Continuous Professional Development | Group session 10 2 hour online workshop: Team Working Communication Support Sharing Best Practice Making Recommendations Building Trust | Group session 11 2 hour online workshop: Your Customers Organisations Customers Internal and External Customers Differing Needs and Priorities Adapting Communication Making Promises Establish the Facts Creating a Positive Customer Experience Building Trust | Group session 12 2 hour online workshop: The Impact of Own Actions on Others Valuing Your Own Work and Contribution Self-Respect Dedication Showing Willing Positivity Motivation Targets Goals | | |
| Additional Group Sessions(as required) E-portfolio (Learning Assistant0 How to Pass EPA Functional Skills 1:1 Session | Functional skills initial assessments and diagnostic assessments and session planning for support, as appropriate | | | | | | | |
| Each session to include a feedback section on activities work produced to date and a review of the training plan Face to face to include observations of skills whenever possible | SPAG check Identify areas for development from written work produced Training plan review Hot Topic Empathy, not sympathy | SPAG check Identify areas for development from written work produced Training plan review Hot Topic Knowing Your Customers | SPAG check Identify areas for development from written work produced Training plan review Progress Review Professional discussion Prioritisation and Time Management | SPAG check Identify areas for development from written work produced Training plan review Hot Topic Right first time and fulfilling promises | SPAG check Identify areas for development from written work produced Training plan review Hot Topic Witness testimony or employer reference behaviours Understanding Customer Experience | SPAG check Identify areas for development from written work produced Training plan review Progress Review Self sufficiency | Exit Review Next steps Information, advice and guidance | |
| EPA planning activities | Understanding EPA process Training Plan review Building showcase portfolio on Learning Assistant | Understanding EPA process Training Plan review Building showcase portfolio on Learning Assistant | Understanding EPA process Training Plan review Building showcase portfolio on Learning Assistant Progress review | Understanding EPA process Training Plan review Building showcase portfolio on Learning Assistant | Understanding EPA process Training Plan review Showcase portfolio completion, submit for IQA | Understanding EPA process Training Plan completion Completion and submission of showcase portfolio, along with IQA feedback | Virtual mock competency interview, professional discussion and questioning | |