

Enquiry Handling Process

Introduction

PAL has a customer services statement which details our commitment to providing excellent customer service. This statement must be read as part of this enquiry handling process document.

Customer Service Responsibility

PAL regards it as everyone's responsibility to provide excellent customer service and our job descriptions and product and service offered are designed with our customers at the centre of what we do.

The Business Development Director responsible for overseeing that PAL personnel¹ adhere to customer service protocols. If the Business Development Director is absent the Managing Director will ensure all PAL actions and activities are aligned to our service offer.

Source of Enquiry

Enquiries can be varied both in respect of content and also how such enquiries are received, which could be via our free phone, email, or a 'dm' or post on our social media pages.

- Freephone 0800 160 1899
- general inquiries and complaints- info@professionalassessment.co.uk
- EPA specific inquiries (for clients registered/contracted with PAL)
epasupportservices@professionalassessment.co.uk
- Appeals- epaappeals@professionalassessment.co.uk
- Malpractice:
 - apprentices / learners apprenticemalpractice@professionalassessment.co.uk
 - employers or providers eitpmalpractice@professionalassessment.co.uk
 - PAL personnel epamalpractice@professionalassessment.co.uk
- conflicts of interest declaration@professionalassessment.co.uk

If an enquiry relates to an enquiry about results, this must be dealt with via our appeals and enquiry policy. Please note the email addresses must be checked daily and note when actioned to avoid duplication of effort.

¹ Personnel includes any person undertaking PAL work and representing PAL the organisation
Enquiry Handling V1 Number 42b November 2020

Enquiry Routing

At PAL we believe that any representative should be able to handle simple enquiries, in the first instance. For more detailed subject specific queries, the following chart details the team responsible for responding to queries:

Subject	Initial Contact
General Enquiries	EPA Team
Registration of Apprentices	EPA Team
Technical Questions relating to Standards- assessment specific	Quality Team
Technical Questions relating to EPAPro (PAL'S registration and scheduling system)	EPA Team
Quality Assurance	Quality Team
Assessment Support materials/resources	Quality Team
Assessment Decisions	Quality Team
Complaints	Business Development Director
Appeals and Disputes	Quality Director
Health and Safety/IT security	Business Development Director
Accounts and Invoicing	Business Development Director
Certification	EPA Team

Timeframes

We will endeavour at all times to:

- Respond to Freephone inquiries and e-mail correspondence within three working days of receipt
- Respond to EPA support inquiries within three working days

Data Capture

- Collect details of nature of inquiry, name, contact details and preference for any follow-up calls, or where meetings/presentations are required. If Money Penny is passing on the enquiry they should have collected some of this information
- Enter details of the enquiry onto the PAL enquiry shared spreadsheet The Business Development Director reviews this document on a highly regular basis and oversees follow ups and outcomes. Enter enquiries both related to audit and compliance consultancy and EPA work on this sheet

Follow up

- Dependent on the nature of the enquiry (i.e. via phone or email) and any particular requests, follow up appropriately.
 - If you follow up by phone, note this on the enquiry sheet and email the BDD to advise them of the communication, if the call related to audit work, include the DAC.
 - If the response required is an email, bcc the BDD so they are aware of the response and if the enquiry relates to audit and compliance bcc in the DAC as well.

Enquiry Response Rules

PAL is required to comply with Ofqual's General Conditions in relation to marketing. Therefore the Managing Director Linda Martin is responsible for ensuring that PAL, or any persons connected with us (e.g. associates; advisory group members, PAL employees) do not:

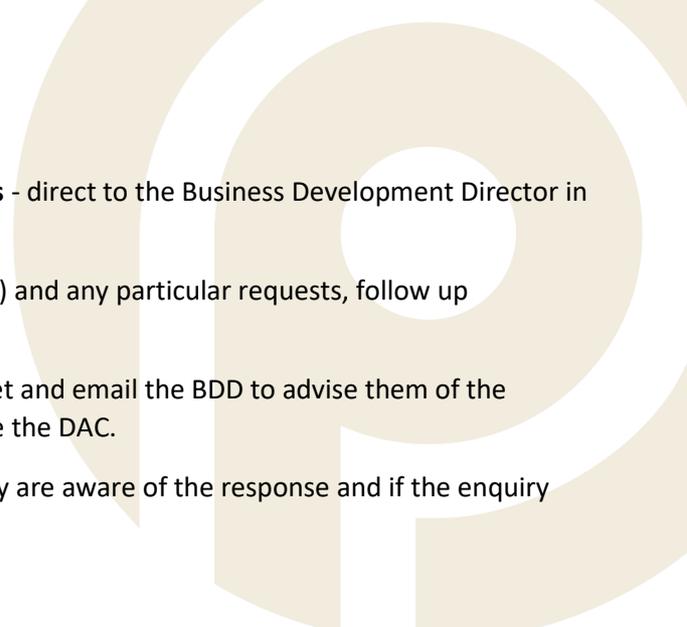
- Make any statements that would be likely to lead users of our EPAO service to believe that we are approved to assess a particular standard, or suite of standards when we are not; this includes any standards/assessment plans we are considering applying for, but as yet have to make a successful application
- Advertise or promote our EPA offer in a manner that is likely to be misleading to users of apprenticeship standards. Where we have made an application to the register for a specific assessment plan, we will make clear the stage of an application and explain to all stakeholders we are not in a position to enrol apprentices for EPA, until we are officially approved
- Promote our end-point assessment service as an undifferentiated part of any package of a broader service.

The Business Development Director is responsible for ensuring the accuracy of PAL's website and social media content.

The Quality Director is responsible for ensuring the accuracy of information issued on Padlets.

Enquiry Process

- **New business enquiry** – If the enquiry is a new enquiry, PAL's preference is to meet with the client via webinar or F2F or telephone call with the person from that organisation, who is in a position to negotiate a contract
 - Confirm we can assess the standards are enquiring about-(all EPA staff should have this information and it is available on the PAL Padlet) if we are in the process of making an application, you may advise the client of this (please note there is no guarantee an application results in automatic acceptance onto the register).
 - Signpost people to our website and social media pages, as these sites, particularly the website which provides essential information about our services.
 - In respect of a meeting the main aim is to listen to the client's requirements and questions and respond accordingly, PAL has marketing materials and presentations that are available to support such meetings
- **Provider enquiry** – If the enquiry has come from a Training Provider, PAL does want to communicate with the employer(s) the Training Provider is representing, to ensure the employer has been given the opportunity to select the EPAO. For employers and Training Providers the information provided is similar and the contracts issued, contain similar information. Only the BDD or one of the Director's in the BDD's absence can negotiate and issue contracts (SLAs) to employers or training providers
- **Apprenticeship Training provision enquiry** - If the enquiry is about the on-programme delivery of apprenticeships, you must make it clear that as an end-point assessment service provider we can provide information in respect of assessment, regarding on-programme delivery if they are looking for a training provider direct them to the IfATE website or the Apprenticeship service, which can offer information about training providers.
- **Price enquiry** - please refer to the latest price list or advise the enquirer the latest price list will be forwarded to them
- **Non-EPA enquires** - please direct these enquires in the first instance to the Business Development Director
- **Sales calls** – i.e. people/ organisations selling to us should be directed to the Business Development Director

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- **Enquires relating to recent PR, Marketing and communications** - direct to the Business Development Director in the first instance
 - Dependent on the nature of the enquiry (i.e. via phone or email) and any particular requests, follow up appropriately.
 - If you follow up by phone, note this on the enquiry sheet and email the BDD to advise them of the communication, if the call related to audit work, include the DAC.
 - If the response required is an email, bcc the BDD so they are aware of the response and if the enquiry relates to audit and compliance bcc in the DAC as well.

Date Created: 10th March 2019

Last Review: 27th November 2020

Next Review: 27th November 2021

Person Responsible for review: Business Development Director

This statement has been agreed by Linda Martin, Managing Director