Professional Assessment Ltd

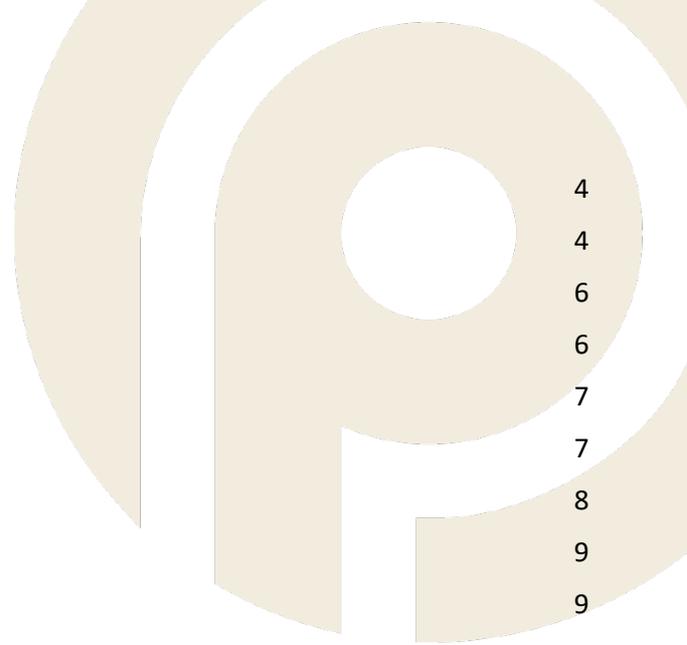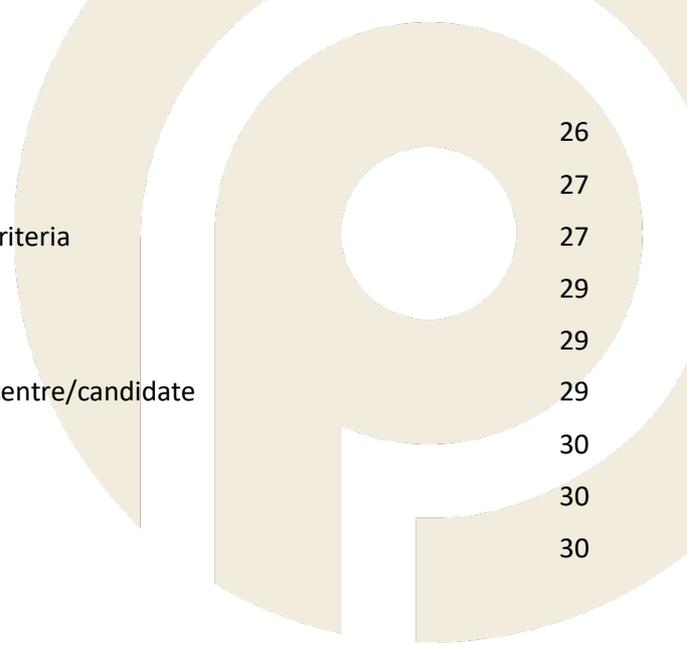# End-Point Assessment Handbook and Specification for Customer Service Practitioner ST0072/AP02 Level 2

Contents

Section 1

Overview

The end-point assessment in this specification relates to the Customer Service Practitioner Apprenticeship ST0072 version AP02. The apprenticeship is at Level 2 and is for apprentices who work provide customer service products and services for businesses and other organisations.

The role of a customer service practitioner may include:

➢ Providing a high quality service to customers – either from the workplace, digitally, or through going out into the customer's own locality.
➢ Dealing with orders, sales, and payments.
➢ Meeting and greeting.
➢ Offering advice, guidance, support and after care.
➢ Dealing with problems or service recovery.
➢ Measuring customer satisfaction.

A customer service practitioner apprentice will:

➢ Influence the customer experience and their satisfaction with your organisation.
➢ Demonstrate excellent customer service skills and behaviours as well as product and/or service knowledge when delivering to your customers.
➢ Provide service in line with the organisation's customer service standards and strategy and within appropriate regulatory requirements.

Customer interactions may cover a wide range of situations and can include face-to-face, telephone, post, email, text, and social media.

The typical duration for this apprenticeship is 12 months but this will depend on apprentices' previous experience and their access to opportunities to gain the full range of competences. The minimum duration of training for any apprenticeship is 366 days, before entering end-point assessment.

To achieve the apprenticeship certificate, apprentices are required to successfully complete their on-programme period of learning and development and the end-point assessment. The purpose of the end-point assessment is to confirm that apprentices have met the required level of knowledge, skills and behavioural standards set by employers.

The overall apprenticeship is graded as fail, pass or distinction.

To achieve the apprenticeship certificate, apprentices are required to successfully complete the:

➢ On-programme period of training and development, including achieving the required Level 1 mathematics and English qualifications.
➢ End-point assessment (EPA) - all components, within the assessment window.

The certificate for the apprenticeship is awarded by the Institute for Apprentices and Technical Education (IfATE), through a process administered by the Education and Skills Funding Agency (ESFA).

As the end-point assessment organisation, Professional Assessment Ltd (PAL) will claim for the certificate on behalf of the apprentice. Certificates are sent to the nominated employer, and it is the employer's responsibility to ensure the apprentice receives the certificate.

The standards and accompanying assessment plan can be accessed via the Institute for Apprenticeships and Technical Education.

Standard Title	Customer Service Practitioner
Level	2
Standard and Version (AP) Number	ST0072/AP02
LARS Number	122
Named EQA Organisation	Ofqual
Duration of End-Point Assessment	3 months
Date the Assessment Plan is scheduled for review	This standard should be reviewed within 3 years of its approval date.
Mandatory Qualifications within the Standard	To meet the apprenticeship standards, apprentices must achieve: ➢ English and maths at Level 1.
End-Point Assessment Methods	The end-point assessment is designed to test the apprentice throughout the entire standard, the assessment methods used to achieve this are as follows: ➢ Apprentice showcase. ➢ Practical observation. ➢ Professional discussion.

Introduction

This handbook contains the relevant information and guidance required of apprentices to achieve the end-point assessment for the Customer Service Practitioner Apprenticeship ST0072/AP02 and should be used in conjunction with the Customer Service Practitioner ST0072/AP02 Padlet[1] – End-Point Assessment Information for Apprentices, Training Providers and Employers.

The overarching aim of the end-point assessment is to ensure that the apprentice meets the standard set out by employers of the relevant sector and that they are fully competent within their job roles. An apprentice must successfully complete all the end-point assessment components to receive the apprenticeship certificate.

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[1] A Padlet is an on-line wiki-based resource, made available to all PAL clients. Resources are updated centrally, so the latest information can be accessed via the Padlet

References to third-party material made in this specification are made in good faith. PAL does not endorse, approve, or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)

All information in this specification is correct at time of publication.

PAL has worked in close collaboration with employers, other assessment organisations and experts from professional bodies and training providers in developing the assessment tools for this end-point assessment. We are grateful to all who have generously shared their time and expertise to help us in the development process.

The end-point assessment (EPA) is an assessment of the knowledge, skills and behaviours outlined in the apprenticeship standard, which have been learned throughout the apprenticeship programme. The purpose of the end-point assessment is to make sure that the apprentice meets the standard in its entirety.

All apprentices must undertake the independent end-point assessment at the end of the on-programme phase of training when their employer, and in some cases their training provider, is satisfied that they have met the 'gateway' criteria to undertake the assessment. Apprentices will not be awarded the apprenticeship certificate until they have successfully completed the end-point assessment.

The end-point assessment can be delivered only by a registered assessment organisation, which must be independent of the employer, or any party involved in the delivery of the on-programme phase of the apprenticeship. In this context, independence, means without influence or bias and the independent assessor assigned is not affiliated to the employer or any training partner involved, and notably the independent assessor has played no part in the training of the apprentice.

All assessment decisions for this standard's end-point assessment must be made by the independent assessment organisation.

PAL has been working closely with occupational experts, employers, and training providers in the development of end-point assessment tools to ensure that they are:

➢ Valid and appropriate to assess occupational competence in the relevant industry and will deliver reliable outcomes.
➢ Fair to all apprentices and help them to make progress in their lives.
➢ Manageable for apprentices and the industry and can be delivered effectively and efficiently in the vocational setting.

Apprenticeship standard objective

The overall goal of the end-point assessment is to ensure that the apprentice has met the required level of knowledge, skills and behavioural standards set by employers and approved by the IfATE and that they are confident and competent in their role to take on responsibilities to deliver clearly defined business outcomes.

Progression

On completion of the apprenticeship, the apprentice could progress into a customer service specialist role. Completion of this apprenticeship will lead to eligibility to join the Institute of Customer Service as an Individual member at Professional level.

Who is Professional Assessment Ltd (PAL)?

PAL provides services for training providers to include colleges and employers involved in the delivery of apprenticeships and adult learning. Our offer includes:

➢ End-point assessment for a wide range of apprenticeship standards. Our dedicated team offers national coverage and has built up extensive experience in administering the latest end-point assessments.

➢ Compliance and audit services. Our funding compliance team tailor their support to meet your specific needs; from ad-hoc advice and support to full ESFA-style audits.

The link to our website can be located by clicking here.

What is needed prior to end-point assessment?

The employer and training provider must confirm that the apprentice has met the on-programme requirements and the apprentice is ready to undertake the end-point assessment.

The employer and training provider must hold a 'Gateway' review to agree that the apprentice has gained the required level of knowledge, skills, and behaviours, along with an English and maths qualification at a Level 1, as set by the apprenticeship standard.

For those with an education, health and care plan or a legacy statement the apprenticeship's English and maths minimum requirement is Entry Level 3 and British Sign Language qualifications are an alternative to English qualifications for those whom this is their primary language.

Please check with the EPA team via info@professionalassessment.co.uk if you do not know which English or maths qualifications are accepted.

Evidence of qualifications must be in the form of a certificate.

To confirm the Gateway review has taken place, the employer, training provider and apprentice are required to complete a Gateway Declaration Record, an example of which is included in the Appendix of this specification. Alternatively, training providers and employers can use their documentation, with the caveat that the document must record the information as stipulated in the PAL Gateway Declaration Record.

PAL will not confirm an end-point assessment booking until the required evidence is submitted. For auditing purposes, the Gateway Declaration Record should either be signed and dated by all parties, or email/DVR confirmation provided that all parties have agreed on readiness.

The recommended approach during the on-programme assessment phase (month 1-12) to ensure that the apprentice is on track is based on the employer's performance management process with the following key elements:

➢ Line manager uses the formal performance management process and regular 1:1s to discuss progress in the apprenticeship, provide feedback and guide development.

➢ The training provider can support this (if required) by ensuring that the requirements of the apprenticeship are reflected in the performance management process and filling any gaps through their work with the apprentice.

➢ The training provider can also support the apprentice on understanding the learning journey, providing advice and guidance on learning strategies and tools that will support the apprentice's preferred learning style and improve their learning agility.

➢ Regular check points between the line manager and training provider (aligned with the performance management process) to ensure that the apprentice is on track and agree how any issues will be addressed.

- ➢ Apprentices should be strongly encouraged to create a learning record that contains examples of their learning and areas for development/action points as they go through the apprenticeship.
- ➢ The training provider can carry out mock end-point assessments with the apprentice.

The Gateway decision regarding readiness will be taken by the line manager (or appropriate employer) representative and apprentice with input from the training provider.

Language of assessment

All components of the end-point assessment will be conducted in English.

Apprentices may be assessed in British Sign Language where it is permitted for the purpose of reasonable adjustment.

Further information on special considerations and reasonable adjustments can be found in our Special Considerations and Reasonable Adjustments policy.

Section 2

How is end-point assessment delivered?

The apprentice will be assessed to the apprenticeship standard using three assessment methods. Each assessment method should directly assess the required knowledge, skills, and behaviours of the standard.

The assessment activities will be completed by the independent assessor as follows:

> ➢ Apprentice showcase.
> ➢ Observation.
> ➢ Professional discussion.

The observation must take place **before** the professional discussion. The apprentice showcase can take place before or after the observation and professional discussion.

The content and structure of the assessment methods is provided by PAL to ensure consistency across all apprentices. The employer, with the support of the training provider where appropriate, will work with the apprentice to agree how the apprentice goes about completing the components of the end-point assessment and will provide guidance along the way as required. The training provider will ensure that the evidence presented for end-point assessment meets the assessment plan requirements but does not have a role in the formal end-point assessment or grade decision.

Apprentices who fail one or more assessment method will be awarded an overall EPA grade of 'fail'. To gain an overall EPA 'pass' grade, apprentices must achieve a pass in all of the assessment methods.

To achieve a distinction, apprentices must achieve all of the pass criteria in all methods plus all of the following:

> ➢ 7 out of 10 distinction criteria in the Apprentice Showcase
> ➢ 4 out of 5 distinction criteria in the Observation
> ➢ 3 out of 4 distinction criteria in the Professional Discussion.

All assessment methods must be passed for the end-point assessment to be passed overall.

The following chart sets out the sequences of the Gateway review and end-point assessment.

Apprentice/Employer/Training Provider		PAL
▪ Apprentice registered with PAL prior to the Gateway review.	⟶	▪ ESFA advised of EPAO. ▪ EPAPro log-in credentials provided. ▪ Access to a range of assessment guidance materials available.
Gateway review held between the training provider, employer, and apprentice to confirm assessment readiness. ▪ Evidence of Level 1 English and maths.	⟶	▪ Declaration received that the apprentice is ready for assessment. ▪ Gateway evidence received. ▪ PAL approves or rejects the Gateway evidence. If rejected, the training provider to resubmit as required.
PAL contacts employer and apprentice. PAL undertakes assessment planning meeting with apprentice and employer and assessment schedule agreed.	⟶	▪ Assessment planning meeting takes place. Dates will be agreed for all methods of assessment to meet with the Customer Service Practitioner Assessment Plan and to allow for

Apprentice/Employer/Training Provider		PAL
		reasonable resit or retake activities within the required window, wherever possible.
Apprentice presents their showcase evidence to include a mapping record and validation. *Refer to section 4 of this specification for showcase presentation options.*		▪ Independent assessor assesses the apprentice showcase and prepares questions for the interview.
Apprentice undertakes the showcase interview. ▪ Interview duration a maximum of 30 minutes.		▪ Interview completed, responses to interview questions assessed. ▪ Assessment of the showcase and interview graded holistically.
Apprentice undertakes the practical observation. ▪ Observation duration a minimum of 1 hour. The IA can extend the observation duration to 90 minutes at their discretion.		▪ Observation completed. ▪ Assessment graded.
Apprentice undertakes the professional discussion assessment. ▪ Professional discussion assessment must last for a maximum of 1 hour. ▪ Please note the agenda will not be shared in advance.		▪ Professional discussion completed, responses to questions assessed. ▪ Assessment graded.
		▪ Overall grading undertaken – independent assessor confirms to PAL grades for all assessment elements and overall grade using grade descriptors as detailed in the assessment plan. ▪ IQA undertaken. ▪ Assessment outcome provided within the assessment window timeframe.
Employer informed of the outcome of end-point assessment via email from: epasupportservices@professionalassessment.co.uk Apprentice and training provider are copied into the communication.		▪ Assessment reports will record decisions and grades. If a resit or retake is required, it is important that the relevant parties refer to the EPA summary record. ▪ Assessment decision data collated and used to inform standardisations processes and quality assurance. ▪ Assessment outcome provided to the training provider and apprenticeship service. ▪ Certificate requested where a pass or higher grade for all aspects of end-point assessment are achieved. ▪ Data provided to the regulator as necessary.

Who can carry out end-point assessment?

Independent assessors/the end-point assessment organisation for this standard are/is required to:

➢ Understand the customer service sector and of the role covered by the apprentice.
➢ Have current occupational competence of two years or more.
➢ Have a sound understanding of the Customer Service Practitioner Apprenticeship standard and have no relationship with the apprentice or the employer.
➢ Have evidence of Continued Professional Development (CPD) to retain occupational competence. This must be evidenced through CVs, CPD logs and any other relevant methods.
➢ Attend a minimum of one standardisation event annually.
➢ Have sufficient resources to carry out the role of independent assessor i.e., time and budget.

All independent assessors that meet the above criteria are trained and approved by PAL to ensure that they are capable carrying out end-point assessments in a fair and consistent manner to make reliable judgments.

PAL requires all end-point assessment staff to hold a recognised assessment qualification.

PAL will be responsible for all aspects of the end-point assessment for this standard and will review the evidence against the standard to ensure that the grading criteria have been met for each method of assessment.

Internal quality assurance requirements

PAL requires all quality assurance staff to hold a recognised internal quality assurance qualification. IQA staff are subject to the requirements of an independent assessor as outlined above and must show competence in subject specialist areas to be approved in internal quality assurance. Quality assurers are monitored to undertake continuous professional development, to ensure the currency of their industry specific knowledge and practice.

PAL implements validation and quality assurance policies and processes to ensure that all assessments are robust, fully align with the independent end-point assessment requirements, and are assessed consistently, reliably, and fairly by all independent assessors.

Policies can be shared upon request, please contact info@professionalassessment.co.uk. Essential policies are also available via our website.

In accordance with these policies PAL will:

➢ Develop and maintain a set of assessment tools, to be used by all independent assessors when carrying out assessments.
➢ Ensure independent assessors for the standard meet with the assessment plan competency requirements.
➢ Train and develop all independent assessors to ensure reliable and consistent assessment of the standard.
➢ Apply robust quality assurance and verification processes to assessments, e.g., the use of standard formats, moderation, and standardisation of marking and assessment decisions.
➢ Apply and follow the appeals and disputes policy and procedure in response to any legitimate appeal or dispute.
➢ Hold standardisation and moderation activities of assessment process.
➢ Communicate with third parties any concerns or issues that may impact on assessment activities or outcomes.

External quality assurance requirements

External quality assurance for the Customer Service Practitioner Apprenticeship is undertaken by Ofqual.

Standardisation and moderation

All independent assessors are required to attend standardisation and moderation activities, to ensure the consistency of the assessment approach and to ensure assessment grading is aligned to the relevant assessment plan requirements. Standardisation activities are carried out on an on-going basis such meetings can be in the format of traditional meetings or via hangouts.

IQAs may accompany or 'remote in' with independent assessors carrying out EPA to ensure that it is being administered safely, securely and in line with PAL guidance.

For further information on quality assurance, standardisation and moderation please see our policies, or contact our quality team via info@professionalassessment.co.uk.

Section 3

Preparing apprentices for end-point assessment

To ensure that apprentices develop the knowledge, skills and behaviours that underpin occupational competence, it is recommended that they follow a structured programme of training and development. The period of training and development must meet the ESFA requirements for off-the-job training, away from the day-to-day job. Please refer to ESFA guidance and funding rules regarding the definition of what training interventions are permissible under the ruling and responsibilities for recording and evidencing off-job training activities.

To prepare apprentices effectively, it is recommended that employers and/or training providers should:

➢ Have a good understanding of the apprenticeship standard and the structure and format of the end-point assessment.
➢ Plan and implement a learning and development programme based on the apprenticeship standard, with regular reviews of progress and readiness, to ensure apprentices develop the required knowledge, skills, and behaviours.
➢ Use formative assessments and mock assessments to help prepare apprentices for the end-point assessment.

It is recommended, that the on-programme assessment includes:

➢ Regular performance reviews between the apprentice and a senior manager.
➢ Opportunities given and evidence generated to cover all assessment criteria.
➢ Feedback from line manager/employer.

End-point assessment planning and scheduling

Employers and/or training providers must have an agreement in place to conduct end-point assessments with PAL, we regularly check the ESFA portal to review pipeline business and ensure that training providers who wish to work with us, are attached to us, as EPAO for the relevant standard(s).

Apprentices must be registered and booked on to their end-point assessment in sufficient time to allow adequate planning and scheduling of the assessments. PAL encourages communication with all parties, in respect of apprenticeship progress and status and our accounts team will periodically communicate directly with other stakeholders, to seek clarification and updates regarding apprentices' assessment readiness. Once the employer or training provider has confirmed a gateway date, PAL will arrange a planning meeting on receipt and validation of the gateway evidence.

The planning meeting is attended by the employer, apprentice, and PAL. The purpose of the planning meeting is to share information with PAL, to support the assessment process and to agree a plan for the upcoming assessment activities for the apprentices. The independent assessor/PAL representative will agree a plan and schedule for each assessment activity to ensure that all assessment components can be completed within the end-point assessment time. The meeting can be conducted remotely using appropriate technology.

The end-point assessment will be conducted over a period of **3 months** at the end of the apprenticeship. Assessments cannot take place if the apprentice has not served the minimum time in training and we require employers and training providers to check this requirement has been met, before submitting gateway evidence.

Reassessment

PAL's Resit and Retake policy will apply in the event of reassessments, and we will discuss arrangements for such activities with all concerned parties.

Reassessments do incur a charge. All fees are detailed in PAL's pricing policy and outlined in the contracting process.

Reassessments wherever possible will be carried out by the original independent assessor, but if this is not possible PAL reserves the right to assign a different independent assessor.

Resits and retakes

Apprentices who fail one or more assessment methods will be offered the opportunity to take a resit or a retake. A resit does not require further learning, whereas a retake does. Apprentices should have a supportive action plan to prepare for a resit or a retake. The apprentice's employer will need to agree with PAL that either a resit or retake is an appropriate course of action.

An apprentice who fails an assessment method, and therefore the end-point assessment in the first instance, will be required to resit any failed assessment methods only.

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.

The timescales for a resit/retake are agreed between the employer and PAL.

Reassessment requirements for each component

If the apprentice fails **the apprentice showcase**, they will be required to resubmit the evidence and to undertake further a further showcase presentation and questioning.

If the apprentice fails the **observation**, they will be required to undertake another, different observation.

If the apprentice fails the **professional discussion**, a further, different professional discussion will be carried out.

Capping

Where any assessment method has to be resat or retaken, there is no mandatory requirement in the Assessment Plan for apprentice's grade will to be capped.

Booking reassessments

The timescale for any reassessment will be agreed on a case-by-case basis, with PAL. As part of that agreement, any reassessments must not provide an apprentice with an unfair advantage over others.

Grading

All end-point assessment methods must be passed for the end-point assessment to be passed overall.

To achieve a pass, the apprentice must achieve all of the pass criteria in all methods of assessment.

To achieve a distinction, apprentices must achieve all of the pass criteria in all methods plus all of the following:

- ➢ 7 out of 10 distinction criteria in the Apprentice Showcase.
- ➢ 4 out of 5 distinction criteria in the Observation.
- ➢ 3 out of 4 distinction criteria in the Professional Discussion.

Section 4

Assessment methods

All end-point assessments should take place within the apprentice's usual working hours and will be planned by the PAL representative with the apprentice and line manager at the planning meeting to comply with the assessment plan and business requirements.

Assessment decisions will not be communicated by the independent assessor straight away, they will document and record their assessment decisions. These decisions are then shared for internal quality assurance checks prior to being communicated to the apprentice, employer, and training provider. Employers can access a record of assessment by accessing EPAPro. User guides are available for training providers and employers that detail how reports can be viewed.

Sample Assessment Materials

For this standard, PAL provides:

➢ A mock apprentice showcase assessment record with sample interview questions.
➢ A mock practical observation assessment record.
➢ A mock professional discussion record with sample questions.

All sample materials can be accessed from the Customer Service Practitioner ST0072/AP02 Padlet.

Assessment Method 1 – Apprentice Showcase

The Showcase

The showcase is completed by the apprentice after they have completed a minimum of 12 months on their apprenticeship (excluding end-point assessment).

The showcase enables the apprentice to evidence examples of their learning and development to present to as part of their end-point assessment. The evidence must cover the minimum knowledge, skills, and behaviour requirements for this method of assessment (see Table 1).

It is of paramount importance that all the work submitted in the showcase has been generated by the apprentice or relates directly to the named apprentice. The independent assessor will undertake authenticity checks regarding evidence as part of the showcase assessment.

What is the format of the apprentice showcase and interview?

The showcase will be assessed in two parts, combining for one component of end-point assessment:

➢ Showcase presentation.
➢ Interview.

The showcase must provide evidence for an externally set brief (set by the EPAO) to cover the following areas:

- ➢ 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.

PAL has provided a mandatory end-point assessment **apprentice brief** and a separate mapping document to accompany the showcase evidence. Both documents can be accessed from the Customer Service Practitioner ST0072/AP02 Padlet. A copy of the brief can also be viewed in Appendix 2 of this specification.

Training providers can use their own mapping document; however, it is a requirement that a mapping document and employer validation statement is submitted with the showcase evidence.

The PAL apprentice brief must be used.

With guidance from the training provider and/or employer, the apprentice will select the best evidence from their portfolio to present to the independent end-point assessor. The evidence will need to show what they have learnt and how they have applied it in their job role. Typically, the apprentice should be using 5 to 10 pieces of evidence from their portfolio.

Supporting evidence may include:

- ➢ Customer feedback.
- ➢ Recordings between the apprentice and their on-programme trainer.
- ➢ Manager statements
- ➢ Witness statements.
- ➢ Performance reviews between the apprentice and their line manager.
- ➢ Personal development plan.
- ➢ Learning journal.

The apprentice will present their showcase to the independent assessor.

How can the showcase presentation be undertaken?

There are **two options for the showcase evidence presentation**:

1. The apprentice can submit their evidence to the independent assessor for remote assessment.
2. The apprentice can carry out a 'live' presentation of their evidence to the Independent Assessor.

The format of the presentation will be agreed with the independent assessor during the end-point assessment planning meeting.

Both options will be followed by an interview with the independent assessor. On the date agreed at the planning meeting, the independent assessor will ask the apprentice questions about their presentation to draw out additional evidence where required. **The interview will last a maximum of 30 minutes** and can be carried out remotely or face to face.

The apprentice can choose to present their evidence in whatever way they prefer, for example, slides, Prezi, Padlet, written report, storyboard, a vlog, a blog.

For option 1 (remote submission) the apprentice **will submit their showcase evidence to PAL at the date agreed during the planning meeting.** There will be a minimum of 2 weeks between the evidence submission and the showcase interview to provide sufficient time for the independent assessor to assess the evidence and select their questions.

For option 2 (live submission) the apprentice must share any **supporting evidence** with the independent assessor at **least 48 hours prior** to the assessment. The live presentation should typically last between **30 and 60 minutes. The interview will take place on the same day.** There will be a short gap of up to 45 minutes between the presentation and the interview to allow the assessor to review their planned questions.

PAL has not set a word count for the showcase to allow the apprentice to express themselves using their choice of written report and/or multi-media.

How can the 'live' presentation and interview be undertaken?

The 'live' presentation and the interview can be conducted using a range of media, as appropriate for the apprentice, either via online video conferencing or face to face. Remote assessment is the preferred option.

It is the responsibility of the apprentice, employer, training provider and PAL to ensure accessibility where required.

The interview must be undertaken in a controlled environment (a quiet area, free from distractions and influence) and the apprentice will be assessed on a one-to-one basis to the independent assessor.

Where the assessment is conducted using technology, fair assessment conditions must be maintained. Acceptable means of remote assessment include video conferencing/video calling and must include a two-way visual and audio link. The video call will be recorded and submitted by the independent assessor for internal quality assurance.

Where the assessment is completed face to face, the independent assessor should complete a digital recording[2] of the presentation.

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[2] Note in exceptional cases, PAL may allow an apprentice to be exempt from a digitally recorded professional discussion; a written record would still be required. Any exemption would need to be agreed at the assessment planning meeting and be subject to PAL's special considerations and reasonable adjustment policy

How can a Customer Service Practitioner apprentice prepare for the apprentice showcase?

- ➢ Ensure that the showcase contains sufficient, good quality evidence to meet the requirements as noted in Table 1 below.
- ➢ Review their own showcase evidence and understand how the examples provided demonstrate the knowledge, skills and behaviours that will be assessed by the presentation and interview.
- ➢ Ensure that they have reflected on their performance and thought about how and when they have demonstrated knowledge, skills, and behaviours in the context of their job role.
- ➢ Complete timed practice presentations (if presenting live) with the training provider, employer, or line manager, building up to the 30-60 minutes.
- ➢ Be sure that wherever possible they use relevant and current industry terminology, and if they use specific terms or jargon that is unique to your workplace, make sure that the IA is aware of this terminology.

Please refer to **Table 1** for the knowledge, skills and behaviours required to be assessed by the apprentice showcase.

Evidence should comply with data protection and GDPR. Ideally, the showcase evidence should be presented electronically.

Table 1: Mapping of Knowledge (Know), Skills (Do), and Behaviours (Show) for the Apprentice Showcase

Module	Standard	What Do I Need to Know/Do/Show
Understanding the Organisation	1. Know the purpose of the business and what 'brand promise' means.	1.1 What is the difference between public, private and third sector organisations? 1.2 What is your organisation business type and purpose? 1.3 What does 'brand promise' mean?
	2. Know your organisation's core values and how they link to the service culture.	2.1 What is meant by an organisations core values? 2.2 What are your organisations core values? 2.3 What is meant by service culture? 2.4 What is your organisations service culture? 2.5 How does your organisations core values link to the service culture?
	3. Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation.	3.1 What is the purpose of an organisational policy? 3.2 List the organisational policies and procedures that could affect a customer service role? 3.3 What should be included in a complaints process/ procedure? 3.4 What is meant by digital media? 3.5 What digital media policies exist in customer service organisations?
Meeting regulations and legislation	1. Know the appropriate legislation and regulatory requirements that affect your business.	1.1 Identify appropriate legislation and regulation and how this effects your organisation.
	2. Know your responsibility in relation to this and how to apply it when delivering service.	2.1 Why is it important to keep information confidential within an organisation. 2.2 What information needs to be kept and remain confidential within your organisation? 2.3 What are the responsibilities of the employee under the health and safety at work act?

Module	Standard	What Do I Need to Know/Do/Show
		2.4 What are the responsibilities of the employer under the health and safety at work act?
Systems and resources	1. Know how to use systems, equipment, and technology to meet the needs of your customers.	1.1 What are the systems, equipment and/or technology your organisation uses to effectively meet customer needs? 1.2 In your role how would you use the systems, equipment and/or technology to support customer needs?
	2. Understand types of measurement and evaluation tools available to monitor customer service levels.	2.1 What are the types of measurement used to monitor customer service level? 2.2 What are the types of evaluation tool used to monitor customer service levels?
Product and service knowledge	1. Understand the products or services that are available from your organisation and keep up-to-date.	1.1 What are your organisations products and/or services? 1.2 What is the difference between providing a product and providing a service? 1.3 How do you update and maintain your knowledge of your organisation's products and/or services?
Influencing skills	1. Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation	1.1 Identify customer needs. 1.2 Offer product and/or service options to customers in a logical and reasoned manner. 1.3 clearly explain how options offered meets the customers' needs. 1.4 Handle customer objections in a positive and professional manner.
Personal organisation	1. Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines.	1.1 Agree goals and deadlines for completing tasks with an appropriate person. 1.2 Prioritise and plan the completion of tasks to meet delivery deadlines. 1.3 Use tools and techniques to monitor progress of tasks. 1.4 Monitor and adjust priorities as required. 1.5 Meet agreed deadlines.
Dealing with customer conflict and challenge	2. Demonstrate patience and calmness.	2.1 Show patience, calmness and empathy when dealing with challenging customer situations. 2.2 Use active listening skills when communicating with customers. 2.3 Use appropriate questioning skills.
	3. Show you understand the customer's point of view.	3.1 Show understanding of the customer viewpoint.
	4. Use appropriate signposting or resolution to meet your customers' needs and manage expectations.	4.1 Explain the next steps and/or customer options in a logical manner. 4.2 Provide clear sign-posting or resolution to meet customers' needs and manage customer expectations. 4.3 Deal with the customer conflict or challenge presented in line with organisational and/or policies procedure. 4.4 Resolve customer conflict or challenge presented in line with organisational policies and/or procedures.
	5. Maintain informative communication during service recovery.	5.1 Keep customers informed of progress while resolving issues. 5.2 Maintain accurate record of customer issues and progress to resolution.
Developing self	1. Take ownership for keeping your service knowledge and skills up-to-date.	1.1 Identify own strengths and weaknesses in relation to working within a customer service role.

Module	Standard	What Do I Need to Know/Do/Show
		1.2 Apply the techniques of self-assessment to look at strengths and weaknesses.
	2. Consider personal goals and propose development that would help achieve them.	2.1 Prepare a personal development plan that helps to achieve personal goals and development needs. 2.2 Review and update your personal development plan.
Being open to feedback	1. Act on and seek feedback from others to develop or maintain personal service skills and knowledge	1.1 Identify suitable ways of obtaining informal and formal feedback from others. 1.2 Obtain useful and constructive feedback about your own service skills and knowledge from others. 1.3 Positively respond to all feedback. 1.4 Use the feedback received to take responsibility for maintaining and developing your personal customer service skills and knowledge.
Team working	1 Frequently and consistently communicate and work with others in the interest of helping customers efficiently.	1.1 Demonstrate the interpersonal skills required to work effectively as part of a team. 1.2 Communicate consistently with team members in the interest of helping customers. 1.3 Demonstrate cooperation when working with others.
	2 Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice.	2.1 Share personal learning with others to support good practice. 2.2 Present your ideas and recommendations for improvements in customer service to others.

How will the apprentice showcase be graded?

To achieve a pass, the apprentice must achieve ALL of the pass descriptors for this method of assessment through their showcase presentation and interview responses.

To achieve a distinction, the apprentice must achieve 7 out of the 10 distinction criteria for this method of assessment through their professional discussion responses.

Please refer to **Table 2** for the pass and distinction descriptors for this method of assessment.

Table 2: Apprentice Showcase Pass and Distinction Grading Criteria

Module	Pass – the apprentice must meet all of the pass criteria below:	Distinction – the apprentice must meet all of the pass criteria plus 7 out of the 10 distinction criteria below.
Understanding the organisation	State the aims of the organisation in relation to its sector. State what is meant by the organisation's 'brand promise'. Explain how the organisation's core values relate to its service culture. State the purpose of different organisational policies and procedures that affect their customer service role.	Explain how the organisational policies and procedures impact on the delivery of customer service.

Module	Pass – the apprentice must meet all of the pass criteria below:	Distinction – the apprentice must meet all of the pass criteria plus 7 out of the 10 distinction criteria below.
	Describe the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment.	
Meeting regulations and legislation	Explain how the relevant legislation and regulations affect the organisation's customer service provision. State their responsibilities for keeping information confidential in the organisation. State the responsibilities of employees and employers under the Health and Safety at Work Act.	Explain the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations. Explain how a code of practice or ethical standards affects customer service.
Systems and resources	Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively. Describe the measures and evaluation tools used in the organisation to monitor customer service levels.	n/a
Product and service knowledge	Explain the difference between the features and benefits of products and/or services in relation to the organisation. Describe how to maintain their knowledge of the organisation's products and/or services.	Explain why it is important to update their knowledge on the organisation's products and/or services.
Influencing skills	Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation. Communicate to customers in a clear and coherent manner how the products and/or services. Handle customer objections in a positive and professional manner.	Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached.
Personal organisation	Prioritise and plan the completion of tasks according to agreed deadlines. Use appropriate tools and techniques to monitor the progress of tasks completion.	Respond in a professional manner to challenges and changes and adjust priorities accordingly.
Dealing with customer conflict and challenge	Maintain calm and patience at all times when dealing with challenging customer situations.	Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.

Module	Pass – the apprentice must meet all of the pass criteria below:	Distinction – the apprentice must meet all of the pass criteria plus 7 out of the 10 distinction criteria below.
	Demonstrate sensitivity to, and interest in, the customers' concerns. Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers. Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures. Keep customers informed of progress while resolving issues. Maintain accurate record of customer issues and progress to resolution.	
Developing self	Conduct a self-assessment to identify their strengths and weaknesses in relation to the job role. Produce a personal development plan to support the achievement of their agreed learning and development goals.	Review the effectiveness of their personal development plan and update it accordingly.
Being open to feedback	Seek constructive feedback about their customer service skills and knowledge from others. Use feedback from others to develop their customer service skills and knowledge.	n/a
Team working	Work with others in a positive and productive manner. Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently. Share personal learning and information with others to support good customer service practice.	Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers. Present reasoned ideas for improving customer service practice to the appropriate colleagues.

Assessment Method 2 – Practical Observation

The practical 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 may be different due to levels of business and customer requirements **but it is mandatory that the observation covers the following as a minimum:**

- ➢ Presentation
- ➢ Equality
- ➢ Interpersonal skills
- ➢ Communication
- ➢ 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.

What is the format of the observation?

The practical observation will be planned and scheduled when the apprentice will be in their normal place of work and will be carried out by the Independent Assessor.

The observation assessment will last for a **minimum of 1 hour.** The independent assessor has the discretion to increase this time to **a maximum of 90 minutes** where required.

Please refer to **Table 3** for the observation pass and distinction grading criteria.

How can a Customer Service Practitioner apprentice prepare for the practical observation?

- ➢ Read the guidance documents and ask questions if the information provided is not clear.
- ➢ Undertake a mock observation with your training provider and use the feedback provided.
- ➢ Be prepared for practical assessment by practising within the assessment timeframe; line managers can give support by providing useful feedback.
- ➢ Ensure that the basics are covered, such as having access to a clean uniform and check equipment and resources are available and in good working order prior to assessment.
- ➢ Remember fundamental customer service principles such as being friendly and courteous.
- ➢ Be prepared to answer questions about the tasks you are completing – what you are doing and why.
- ➢ Ensure that the practical assessment can start on time be being prepared and organised.
- ➢ Be aware that unexpected situations can occur during practical tasks. Practice working on wider skills such as keeping calm and focused. It may be useful to write a list of scenarios that could go wrong during the observation and what possible solutions there are for you to implement.

How will the practical observation be grade

To achieve a pass, the apprentice must achieve ALL of the pass descriptors for this method of assessment through their observation.

To achieve a distinction, the apprentice must achieve 4 out of the 5 distinction criteria for this method of assessment through their professional discussion responses.

Please refer to **Table 3** for the pass and distinction descriptors for this method of assessment.

Table 3: Observation Pass and Distinction Grading Criteria

Module	Pass – the apprentice must meet all of the pass criteria below:	Distinction – the apprentice must meet all of the pass criteria plus 4 out of the 5 distinction criteria below.
Interpersonal skills	Demonstrate willingness and ability to engage with customers in a positive manner using relevant interpersonal skills. Work with customers to build a rapport, recognising and where possible meeting their needs and expectations. Show willingness to work with others and share ideas where appropriate.	Demonstrate ability to adapt interpersonal skills when working on meeting the needs and expectations of different customers, showing knowledge of the application of the Equality Act when communicating (verbally or non-verbally). Demonstrate ability to balance the needs and expectations of the customer with that of the organisation. Pro-actively work with others to ensure efficient customer service delivery.
Communication	Face to face'. Demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills. Adapt tone, behaviour, and body language when necessary, recognising and confirming understanding of needs and expectations. Demonstrate ability to recognise when to summarise and the techniques to use. Non- facing'. Demonstrate ability to make initial customer contact and make use of appropriate communication skills. Adapts tone and behaviour when necessary, recognising and confirming understanding of needs and expectations. Demonstrates ability to recognise and use reinforcement techniques during customer interactions.	In all roles, demonstrate 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 handing. In all roles, demonstrate ability to flex to various customer personalities, while remaining calm and in control where necessary. They will also demonstrate they know the organisational procedures to be followed in all communication and the importance to the brand/organisation of this requirement.

Module	Pass – the apprentice must meet all of the pass criteria below:	Distinction – the apprentice must meet all of the pass criteria plus 4 out of the 5 distinction criteria below.
Equality – treating all customers as individuals	Recognise and respond to individual needs to provide a personalised customer service experience. Behave in a way that upholds the core values and service culture of the organisation.	n/a
Presentation – dress code, professional language	Present a professional image in line with the organisational dress code and code of conduct. OR Demonstrate a positive attitude and welcoming approach consistently when dealing with customers. AND Maintain professional and positive language consistently in difficult customer interactions.	n/a
Right first time	Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging. They will show an ability to establish needs and expectations, working towards meeting them where possible, explaining, when necessary, when they cannot be met. Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures. Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers. Take ownership from beginning to end, building, and maintaining a relationship with the customer. Recognise the importance of good customer service to the customer and in turn the organisation, making contact as promised, referring to others as necessary with all	n/a

Module	Pass – the apprentice must meet all of the pass criteria below:	Distinction – the apprentice must meet all of the pass criteria plus 4 out of the 5 distinction criteria below.		
	required detail, following up to ensure conclusion.			

Assessment Method 3 – Professional Discussion

The professional discussion is a meaningful, structured discussion designed to draw out the best of the apprentice's competence for the grading descriptors assigned to this method of assessment (see Table 4).

The agenda points will act as a base for the apprentice to make detailed and proactive contributions to confirm their competence. It will allow the apprentice to evidence both the knowledge gained and its application through skills and behaviours.

The discussion will allow the independent assessor to thoroughly test understanding through open and follow up (clarification) questions. It will also allow the independent assessor to clarify any questions they have from the observation, and to assess any areas that were not naturally occurring (if permitted by the assessment plan).

The professional discussion assessment duration is **60 minutes**.

What is the format of the professional discussion?

The independent assessor will ask the apprentice a series of open ended, competency-based questions.

Questions will be a combination of those taken from the PAL professional discussion question bank and those generated by the independent assessor to draw out the best of the apprentice's competence and excellence. Further questions may be asked for clarification purposes and to allow the apprentice the opportunity to cover the grading descriptors mapped to this method of assessment.

The agenda is not shared with the apprentice, employer, or training provider in advance of the assessment.

How can the professional discussion be undertaken?

The professional discussion can be conducted using a range of media, as appropriate for the apprentice, either via online video conferencing or face to face. Remote assessment is the preferred option.

It is the responsibility of the apprentice, employer, training provider and PAL to ensure accessibility where required.

The professional discussion must be undertaken in a controlled environment (a quiet area, free from distractions and influence) and the apprentice will be assessed on a one-to-one basis to the independent assessor.

Where the assessment is conducted using technology, fair assessment conditions must be maintained. Acceptable means of remote assessment include video conferencing/video calling and must include a two-way visual and audio link. The video call will be recorded and submitted by the independent assessor for internal quality assurance.

Where the assessment is completed face to face, the independent assessor should complete a digital recording[3] of the presentation.

How can a Customer Service Practitioner apprentice prepare for the professional discussion?

- ➢ Practice undertaking professional discussions with their training provider, employer, and line manager.
- ➢ Practice discussions which cover a range of topics and areas of the standard, ensuring that they can provide full answers and specific examples of tasks/situations they have been involved in.
- ➢ Practice reflecting and analysing performance to determine successes and areas for development.
- ➢ Review terminology in the assessment plan and consider how this links to their role. Practice professional discussions mock agendas with their training provider building up to 60 minutes to support completing them within the given timescale.

How will the professional discussion be graded?

To achieve a pass, the apprentice must achieve ALL of the pass descriptors for this method of assessment through their professional discussion responses.

To achieve a distinction, the apprentice must achieve 3 out of the 4 distinction criteria for this method of assessment through their professional discussion responses.

Please refer to **Table 4** or the pass and distinction descriptors for this method of assessment.

Table 4: Professional Discussion Pass and Distinction Grading Criteria

Module	Pass – the apprentice must meet all of the pass criteria below:	Distinction – the apprentice must meet all of the pass criteria plus 3 out of the 4 distinction criteria below.
Knowing your customers	Explain the difference between internal and external customers in the context of their organisation. Describe the specific needs of different customers, including those protected under current Equality law. Explain when and how to adapt their service approach to meet the needs and expectations of customers. Explain when and how to adapt service approach to meet the needs and expectations of customers.	Explain the importance of building good customer relationships to the organisation. Explain the difference in the way internal and external customer relationships are managed. Explain the importance of balancing the needs of both the organisation and its customers.

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[3] Note in exceptional cases, PAL may allow an apprentice to be exempt from a digitally recorded professional discussion; a written record would still be required. Any exemption would need to be agreed at the assessment planning meeting and be subject to PAL's special considerations and reasonable adjustment policy

Module	Pass – the apprentice must meet all of the pass criteria below:	Distinction – the apprentice must meet all of the pass criteria plus 3 out of the 4 distinction criteria below.
Your role and responsibility	Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation. Describe how to achieve their agreed targets and goals.	n/a
Customer experience	Explain how an understanding of the facts can be used to create a customer focused experience. Explain how to build trust with customers and the importance of doing so.	Explain how to respond to customer needs and requirements positively.

Section 5

Fails/resits and retakes

PAL's Resit and Retake policy and pricing policy are available on request. The request can be made by contacting the account management team via email on info@professionalassessment.co.uk.

The apprentice, employer and training provider will be advised of the outcomes, and our policy works on the specific standard assessment plan's requirements regarding resits and retakes.

Plagiarism

Plagiarism is a specific form of cheating which applies to assignments or other types of written or recorded work completed by apprentices, where the work is meant to have been produced independently and be of their design. Plagiarism is the substantial, unacknowledged incorporation into an apprentice's work of materials derived from published or unpublished work by another person.

PAL takes all incidents of plagiarism seriously, especially those incidents which are a determined and deliberate attempt by the apprentice to gain marks for an assignment/project/report without having done a substantial portion of the work themselves. Copying of work can include work from external published sources, as well as that of other apprentices and work colleagues.

PAL's plagiarism and cheating policy can be accessed on the PAL website or by request to info@professionalassessment.co.uk

Appeals, complaints, maladministration, and malpractice policies - centre/candidate

Where apprentices are unhappy with the results of their end-point assessment, the customer (either the employer or training provider) can enquire about the results. An enquiry means that PAL will invoke its Appeals and Disputes policy and procedure. Please refer to our latest emails.

To make an appeal, please contact: epaappeals@rofessionalassessment.co.uk

To declare a conflict of interest, please contact: declaration@professionalassessment.co.uk

To report a case of malpractice or maladministration please use one of the following addresses:

> If it relates to the EPAO, please contact: epamalpractice@professionalassessment.co.uk

> If it relates to the apprentice, please contact: apprenticemalpractice@professionalassessment.co.uk

> If it relates to the employer or training provider, please contact: eitpmalpractice@professionalassessment.co.uk

Note - access to these emails received under these addresses is restricted to personnel involved in compliance checks.

In the event of an appeal against the grade awarded PAL will carry out a further review of the evidence to confirm or modify the grade in line with their standard procedures.

Maladministration generally refers to a system or administrative mistake or failure, which has the potential or does not affect the assessment process and as such is reportable.

Malpractice is a grave offence and where proven will result in immediate sanctions, disciplinary action and possible dismissal and notification to the regulator, notifying them of the malpractice and action taken. Malpractice is the

term applied to any intentional and planned act to alter an assessment or quality assurance decision by changing/removing/not recording accurately or augmenting information.

PAL's Maladministration and Malpractice policy can be accessed on the PAL website or by request to info@professionalassessment.co.uk

Reasonable adjustments/considerations/adaptations

Where reasonable adjustments have been requested, the assessor at the assessment planning meeting will finalise any such arrangements. Discussions regarding a reasonable adjustment request should be made at registration and discussed with the EPA team.

It is the responsibility of the training provider or employer, acting on behalf of the apprentice, to make such requests.

Special considerations in respect of the assessment process will be applied, where it does not provide any fair or unfair advantage to the individual apprentice and subsequent assessment outcome and in line with PAL's policy.

PAL's Special Considerations and Reasonable Adjustment policy is in place to ensure fair access to assessment and can be accessed on the PAL website or by request to info@professionalassessment.co.uk

Certification

PAL will request the apprenticeship certificate for successful end-point assessments using the Apprenticeship service portal. PAL does not certificate the apprenticeship standard, its role is to request the certificate.

PAL will provide information and reports to the relevant regulator and funding body, in line with their conditions, and as and when requested. Notification to these bodies includes successful achievements and completion but a fail. Incomplete assessments are recorded.

Certification requests are made by the EPAO and the current process is the certificate is sent to the named employer. Employers must advise the EPAO of any specific location or person the certificate should be sent to, if this information differs from the apprentice's workplace location and employer contact details provided on the EPAO's booking system.

Cancelling or rescinding results - PAL reserves the right to cancel results if malpractice is identified.

Validity, Authenticity, Relevancy, Currency, and Sufficiency

The evidence presented must be meet VARCS requirements.
  - **Valid** - is the evidence appropriate to demonstrate the particular knowledge, skills and/or behaviours that it is intended to cover?
  - **Authentic** - is the evidence proven to be the apprentice's own work; have any work products or witness testimonies been appropriately authenticated?
  - **Relevant** - Is the evidence relevant to the particular knowledge, skills and/or behaviours that it is intended to cover and has a clear judgement?
  - **Current** - does the evidence relate to the on-programme element of the apprenticeship and does it demonstrate current competency?
  - **Sufficient** - does the evidence match the level of the apprenticeship standard and is the relevant standard covered in full?

PAL will require all apprentices to sign statements of authenticity etc.

Glossary of Terms

EPA – end-point assessment.

IA - independent assessor.

Employer – A representative from the employer, this is usually a direct line manager, head chef or appropriate nominate representative who has supported the apprentice during their apprenticeship.

Gateway review – A meeting involving the apprentice, employer and on programme trainer where the readiness for end-point assessment is determined.

Planning meeting – A meeting involving the apprentice, employer and end-point assessor where the end-point assessments are clarified and planned.

PAL – Professional Assessment Limited.

IQA - Internal quality assurance/assurer, the department and/or personnel who are responsible for the quality of end-point assessment internally to Professional Assessment.

EQA – External quality assurance/assurer, the independent external body who are responsible to regulate the quality of end-point assessment plans, standards, and administration of assessment.

Standardisation/moderation – Activity completed by end-point assessors to support validity and fairness in end-point assessment decisions.

Special considerations – Any permanent or temporary disability, specific learning needs or medical condition which may require support during end-point assessment.

Reasonable adjustments – Adjustments made to the assessment process in relation to special considerations, which do not provide an unfair advantage to the apprentice but are designed to reduce any disadvantages within assessment.

Assessment plan – The document produced by the employer group, approved by the EQA which documents the requirements of the standard and assessment methods.

Guidance notes

Determining the readiness of an apprentice for the independent end-point assessment phase of their programme is a very important milestone. A formal review must be held and must include all the relevant people that have responsibility and accountability for the completion of the apprenticeship: the line manager (or a senior manager, as appropriate to the business), the training provider and the apprentice.

The Gateway Declaration Record must be completed once the line manager and training provider have discussed their views on the progress the apprentice has made. The record has been designed to ensure all essential information is captured in a standardised format. If there is additional information which the line manager and/or training provider wish to add supplementary space has been provided.

Completion of this Gateway Declaration Record confirms that the employer and training provider is satisfied the apprentice has fulfilled all requirements to apply for end-point assessment.[4]

All evidence requested must be provided. If the Gateway requirements below are not met, the Gateway request will be rejected.

All information received will be processed as per GDPR requirements and as detailed in Professional Assessment Ltd.'s (PAL) Data Protection Policy and Data Privacy Notice.

Please ensure the apprentice's name is spelled accurately as this is how it will appear on the results statement/certificate.

Apprentice Name	Click or tap here to enter text.	Apprentice Contact Number	Click or tap here to enter text.
Apprentice ULN	Click or tap here to enter text.	Apprentice Email Address	Click or tap here to enter text.
Line Manager Name	Click or tap here to enter text.	Line Manager Contact Number	Click or tap here to enter text.
Employer Organisation	Click or tap here to enter text.	Line Manager Email Address	Click or tap here to enter text.
Training Provider Name	Click or tap here to enter text.	Gateway Review Date	Click or tap to enter a date.
Start Date of Apprenticeship	Click or tap to enter a date.	End Date of Apprenticeship	Click or tap to enter a date.
Has the minimum apprenticeship duration of 12 months been met, as defined in the ESFA funding rules?		Yes ☐ No ☐	

Section 1: Confirmation of Evidence

All requirements listed below must be uploaded to EPAPro at point of submitting the apprentice to gateway. Apprentices will not be permitted to proceed to their end-point assessment until all evidence is uploaded and approved by PAL.

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[4] Please refer to the latest ESFA funding rules guidance.

Requirement	Achieved by the apprentice	Evidence provided (e.g., PLR, certificate, statement of results)
Maths Level 2	Yes ☐ No ☐	Click or tap here to enter text.
English Level 2	Yes ☐ No ☐	Click or tap here to enter text.

Gateway Review Outcome

If the apprentice is ready for end-point assessment, the following declaration must be signed by all parties and the Gateway Declaration Record submitted to PAL via EPAPro.

Should the apprentice not be ready for end-point assessment a period of additional training and preparation must take place.

Section 2: Declaration

The end-point assessment period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say they are deemed to have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider, but the decision must ultimately be made solely by the employer.

Employer and Training Provider Declaration

I confirm the evidence has been reviewed and a Gateway meeting has taken place with the apprentice, employer, and training provider to confirm the apprentice's competence and readiness for end point assessment.

I confirm that the apprentice has developed, demonstrated, and achieved the required level of occupational knowledge, skills, and behaviours to satisfy the Gateway requirements in their workplace.

I confirm that the apprentice is eligible for end-point assessment by undertaking the required training in line with the specific Apprenticeship Standard's requirements, including on and off the job training and experience to meet the full breadth and depth of the Apprenticeship Standard.

Employer		Training Provider	
Name	Click or tap here to enter text.	**Name**	Click or tap here to enter text.
*Signature	Click or tap here to enter text.	***Signature**	Click or tap here to enter text.
Date	Click or tap to enter a date.	**Date**	Click or tap to enter a date.

*Supporting evidence to be submitted for electronic signatures, e.g., email confirmation, voice recording.

Apprentice Declaration

I confirm my readiness for the end-point assessment has been discussed with my employer and training provider.

I confirm I am aware of the requirements of the end-point assessment.

I give PAL, as the end-point assessment organisation, my consent to claim the apprenticeship certificate on my behalf on successful completion of the end-point assessment.

Name	Click or tap here to enter text.
Signature	Click or tap here to enter text.
Date	Click or tap to enter a date.

Any reasonable adjustments required? Please detail below and include any supporting evidence
State N/A if not applicable

Click or tap here to enter text.

Please note any other pertinent information, as a result of the Gateway review, which has not been recorded elsewhere, but has a bearing on end-point assessment readiness or end-point assessment scheduling

Click or tap here to enter text.

Appendix 2 – Apprentice Showcase Brief

The apprentice showcase is a method of end-point assessment and is completed after a minimum of 12 months on your apprenticeship. It will allow you to reflect on your learning and development through your portfolio evidence.

With guidance from your training provider and/or employer, you will select the best evidence from your portfolio to present to your independent end-point assessor. Your evidence will need to show what you have learnt and how you have applied it in your job role. Typically, you should be using **5 to 10 pieces of evidence** from your portfolio.

The evidence must cover the minimum knowledge, skills, and behaviour requirements for this method of assessment. PAL has provided a showcase mapping record which must be completed and submitted with your showcase. The mapping record is available on the **Customer Service Practitioner AP02 Padlet.**

The **apprentice showcase has two components**:

- ➢ *Showcase Presentation.
- ➢ Interview.

*There are **two options for the showcase presentation**:

3. You can submit your evidence to the independent assessor for remote assessment.
4. You can carry out a 'live' presentation of your evidence to the independent assessor.

The option for the presentation will be agreed with the independent assessor during the end-point assessment planning meeting.

Both options will be followed by an interview with the independent assessor. On the date agreed at the planning meeting, the independent assessor will ask you questions about your presentation to draw out additional evidence where required. **The interview will last a maximum of 30 minutes** and can be carried out remotely or face to face.

You can choose to present their evidence in whatever way you prefer, for example, slides, Prezi, Padlet, written report, storyboard, a vlog, a blog.

For option 1 (remote submission) you **will submit your showcase evidence to PAL at the date agreed during the planning meeting.** There will be a minimum of 2 weeks between the evidence submission and the showcase interview to provide sufficient time for the independent assessor to assess the evidence and select their questions.

For option 2 (live submission) you will share any **supporting evidence** for your showcase presentation with the independent assessor at **least 48 hours prior** to the assessment date.

Your 'live' presentation should typically last between **30 and 60 minutes. The interview will take place on the same day.** There will be a short gap of up to 45 minutes between the presentation and the interview to allow the assessor to review their planned questions.

PAL has not set a word count for the showcase to allow you to express yourself using their choice of written report and/or multi-media.

Your showcase must provide evidence to cover the following areas:

Theme	Standard	What Do I Need to Know/Do/Show
Understanding the Organisation	1. Know the purpose of the business and what 'brand promise' means.	1.1 What is the difference between public, private and third sector organisations? 1.2 What is your organisation business type and purpose? 1.3 What does 'brand promise' mean?
	2. Know your organisation's core values and how they link to the service culture.	2.1 What is meant by an organisations core values? 2.2 What are your organisations core values? 2.3 What is meant by service culture? 2.4 What is your organisations service culture? 2.5 How does your organisations core values link to the service culture?
	3. Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation.	3.1 What is the purpose of an organisational policy? 3.2 List the organisational policies and procedures that could affect a customer service role? 3.3 What should be included in a complaints process/ procedure? 3.4 What is meant by digital media? 3.5 What digital media policies exist in customer service organisations?
Meeting regulations and legislation	1. Know the appropriate legislation and regulatory requirements that affect your business.	1.1 Identify appropriate legislation and regulation and how this effects your organisation.
	2. Know your responsibility in relation to this and how to apply it when delivering service.	2.1 Why is it important to keep information confidential within an organisation. 2.2 What information needs to be kept and remain confidential within your organisation? 2.3 What are the responsibilities of the employee under the health and safety at work act? 2.4 What are the responsibilities of the employer under the health and safety at work act?
Systems and resources	1. Know how to use systems, equipment, and technology to meet the needs of your customers.	1.1 What are the systems, equipment and/or technology your organisation uses to effectively meet customer needs? 1.2 In your role how would you use the systems, equipment and/or technology to support customer needs?

Theme	Standard	What Do I Need to Know/Do/Show
	2. Understand types of measurement and evaluation tools available to monitor customer service levels.	2.1 What are the types of measurement used to monitor customer service level? 2.2 What are the types of evaluation tool used to monitor customer service levels?
Product and service knowledge	1. Understand the products or services that are available from your organisation and keep up-to-date.	1.1 What are your organisations products and/or services? 1.2 What is the difference between providing a product and providing a service? 1.3 How do you update and maintain your knowledge of your organisation's products and/or services?
Influencing skills	1. Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation	1.1 Identify customer needs. 1.2 Offer product and/or service options to customers in a logical and reasoned manner. 1.3 clearly explain how options offered meets the customers' needs. 1.4 Handle customer objections in a positive and professional manner.
Personal organisation	1. Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines.	1.1 Agree goals and deadlines for completing tasks with an appropriate person. 1.2 Prioritise and plan the completion of tasks to meet delivery deadlines. 1.3 Use tools and techniques to monitor progress of tasks. 1.4 Monitor and adjust priorities as required. 1.5 Meet agreed deadlines.
Dealing with customer conflict and challenge	2. Demonstrate patience and calmness.	2.1 Show patience, calmness and empathy when dealing with challenging customer situations. 2.2 Use active listening skills when communicating with customers. 2.3 Use appropriate questioning skills.
	3. Show you understand the customer's point of view.	3.1 Show understanding of the customer viewpoint.
	4. Use appropriate signposting or resolution to meet your customers' needs and manage expectations.	4.1 Explain the next steps and/or customer options in a logical manner. 4.2 Provide clear sign-posting or resolution to meet customers' needs and manage customer expectations. 4.3 Deal with the customer conflict or challenge presented in line with organisational and/or policies procedure.

Theme	Standard	What Do I Need to Know/Do/Show
		4.4 Resolve customer conflict or challenge presented in line with organisational policies and/or procedures.
	5. Maintain informative communication during service recovery.	5.1 Keep customers informed of progress while resolving issues. 5.2 Maintain accurate record of customer issues and progress to resolution.
Developing self	1. Take ownership for keeping your service knowledge and skills up-to-date.	1.1 Identify own strengths and weaknesses in relation to working within a customer service role. 1.2 Apply the techniques of self-assessment to look at strengths and weaknesses.
	2. Consider personal goals and propose development that would help achieve them.	2.1 Prepare a personal development plan that helps to achieve personal goals and development needs. 2.2 Review and update your personal development plan.
Being open to feedback	1. Act on and seek feedback from others to develop or maintain personal service skills and knowledge	1.1 Identify suitable ways of obtaining informal and formal feedback from others. 1.2 Obtain useful and constructive feedback about your own service skills and knowledge from others. 1.3 Positively respond to all feedback. 1.4 Use the feedback received to take responsibility for maintaining and developing your personal customer service skills and knowledge.
Team working	1 Frequently and consistently communicate and work with others in the interest of helping customers efficiently.	1.1 Demonstrate the interpersonal skills required to work effectively as part of a team. 1.2 Communicate consistently with team members in the interest of helping customers. 1.3 Demonstrate cooperation when working with others.
	2 Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice.	2.1 Share personal learning with others to support good practice. 2.2 Present your ideas and recommendations for improvements in customer service to others.