



CUSTOMER SERVICE

SPECIALIST

Level 3 Standard



CUSTOMER SERVICE SPECIALIST LEVEL 3

A professional for direct customer support within all sectors and organisations

The main purpose of a customer service specialist is to be a 'professional' for direct customer support within all sectors and organisation types. They are an advocate of Customer Service who acts as a referral point for dealing with more complex or technical customer requests, complaints, and queries. They are often an escalation point for complicated or ongoing customer problems. As an expert in their organisation's products and/or services, they share knowledge with the wider team and colleagues. They gather and analyse data and customer information that influences change and improvements in service. Utilising both organisational and generic IT systems to carry out their role with an awareness of other digital technologies. This could be in many types of environment including contact centres, retail, webchat, service industry or any other customer service point.

Grey Seal support Customer Service Specialists to have the knowledge, skills and behaviours to deliver on their responsibilities and personally develop within their role. They will learn new ideas, theories and methods as well as consolidating existing knowledge and experience. Having this knowledge and with the support of their Trainer they will have the confidence to put new knowledge into practice.

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

COURSE CONTENT

To develop rounded Customer Service Specialists we cannot focus on knowledge alone. Practitioners need to be able to use the information they learn to develop skills and behaviours enabling them to be effective

Grey Seal trainers are experienced Customer Service managers who train and support apprentices to use their new knowledge and skills in their roles. Each module supports the knowledge, skills and behaviours to be effective.



CUSTOMER SERVICE SPECIALIST LEVEL 3

MODULES

KNOWLEDGE

Business Knowledge and Understanding

- Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation
- Understand the impact your service provision has on the wider organisation and the value it adds
- Understand your organisation's business strategy in relation to customers and make recommendations
- Understand the principles and benefits of being able to think about the future when taking action or making service related decisions
- Understand a range of leadership styles and apply them successfully in a customer service environment

Customer Journey knowledge

- Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience
- Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention
- Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation
- Understand commercial factors and authority limits for delivering the required customer experience

CUSTOMER SERVICE SPECIALIST LEVEL 3

MODULES

KNOWLEDGE

Knowing your customers and their needs/ Customer Insight

- Know your internal and external customers and how their behaviour may require different approaches from you
- Understand how to analyse, use and present a range of information to provide customer insight
- Understand what drives loyalty, retention and satisfaction and how they impact on your organisation
- Understand different customer types and the role of emotions in bringing about a successful outcome
- Understand how customer expectations can differ between cultures, ages and social profiles

Customer service culture and environment awareness

- Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers
- Understand your business environment and culture and the position of customer service within it
- Understand your organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong

CUSTOMER SERVICE SPECIALIST LEVEL 3

MODULES

Business focused service delivery

- Demonstrate a continuous improvement and future focused approach to customer service delivery including decision making and providing recommendations or advice
- Resolve complex issues by choosing from and applying a wide range of approaches
- Find solutions that meet your organisations needs as well as the customer requirements

Providing a positive customer experience

- Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes
- Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy
- Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps
- Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction
- Demonstrate a cost conscious mind-set when meeting customer and the business needs
- Identifying where highs and lows of the customer journey produce a range of emotions in the customer
- Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format

CUSTOMER SERVICE SPECIALIST LEVEL 3

MODULES

SKILLS

Working with your customers / customer insights

- Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it
- Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service

Customer service performance

- Maintain a positive relationship even when you are unable to deliver the customer's expected outcome
- When managing referrals or escalations take into account historical interactions and challenges to determine next steps

Service improvement

- Analyse the end to end service experience, seeking input from others where required, supporting development of solutions
- Make recommendations based on your findings to enable improvement
- Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice

CUSTOMER SERVICE SPECIALIST LEVEL 3

MODULES

BEHAVIOURS

Developing self

- Proactively keep your service, industry and best practice knowledge and skills up-to-date
- Consider personal goals related to service and take action towards achieving them

Ownership / Responsibility

- Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation
- Be proactive and creative when identifying solutions for customer and organisation issues
- Make realistic promises and deliver on them

Team working

- Work effectively and collaboratively with colleagues at all levels to achieve results.
- Recognise colleagues as internal customers
- Share knowledge and experience with others to support colleague development

Equality

- Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer
- Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment

Presentation

- Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction
- Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand

ON-PROGRAMME ASSESSMENT

COURSE DESIGN AND TRAINING DELIVERY

Grey Seal has a blended approach to the training and assessment of knowledge, skills and behaviours. The on-programme assessment will give an indication of performance against the final outcomes defined in the standard. Each programme whilst covering all the areas required will be individualised as much as possible to take account of learning styles, time allocation etc. During the programme, apprentices will be building a portfolio of work-based and academic evidence.

Methods and time scales of training delivery are tailored to the learner, topic and the facilities available. For example, some topics maybe better delivered in a workshop style but depending on facilities and locations of learners this can be undertaken by getting together in a small group or online using our video conferencing software.

We use a variety of training delivery methods and resources that can include:

- Trainer led group sessions face:face or online using video conferencing
- Individual training sessions face to face, telephone or video conferencing
- Resources – paper based, electronic and signposted external resources
- Online portfolio; accessed by learner and organisational contact e.g., line manager
- Virtual learning environment
- Individualised approach
- Access to a Trainer through the portfolio, phone, text, email, IM ...
- Follow a personalised programme for Maths and English
- Trainers are qualified and subject specialists with experience within the sector

EPA ASSESSMENT GATEWAY

Apprentices must demonstrate that they meet the knowledge, skills behaviours of the standard before being considered for the EPA. The decision as to whether apprentices are ready to undertake the EPA should be made jointly by the employer, apprentice and training provider.

The employer makes the final decision. Training providers are responsible for convening such panels on an as needs basis



END POINT ASSESSMENT

The EPA will contain three components:

ASSESSMENT METHOD

Practical observation with Q&A

The apprentice must be observed, by an independent assessor, undertaking a range of day to day workplace activities. The observation should involve activities which allow the apprentice to demonstrate the full range of their knowledge, skills and behaviours required. The observation must include questioning to clarify knowledge and understanding is being applied.

Work based project, supported by an interview

Apprentices must submit a written report of c2,500 words on a project they have carried out. The subject should cover a specific high-level challenge (such as a complaint or difficult situation) that the apprentice has dealt with explaining what it was, what actions (planning and execution) they took, what solutions were offered, details of any recommendations made to change a policy or process and any feedback from the customer. Details should also include the apprentice's responsibilities and results. The report should contain annexes that are attributable to the apprentice and the actions they took. Example evidence could be emails, letters, meeting notes, call logs, workflow documents or, feedback. The interview will focus on the written project and any supporting annexes. The interview will consist of 10 competency-based questions.

Professional discussion supported by portfolio evidence

Evidence from the on-programme portfolio will be used as a base to support the professional discussion. The apprentice will extract, from their portfolio, evidence which is suitable for supporting them in their professional discussion. This evidence will consist of a minimum of 10 pieces of evidence to a maximum of 15 pieces and related to the standards which apply to the professional discussion. This could include witness statements, customer feedback such as emails or letters, manager feedback from one-to-one or alike. The portfolio of evidence is not directly assessed.



greyscale