

Level 3 Customer Service Specialist EPA PROJECT pack

What is the work-based project about?

The project can be about anything that is relevant to your workplace. For example, it may be an improvement process, such as improving customer service or changing the way a task is carried out to make it quicker. The final written project report should detail a specific high-level challenge and must include evidence that meets the knowledge and skills detailed in the standard

What should be included in my proposal?

A proposal outlining the subject of your work-based project should be submitted for approval to the EPAO as you pass through the Gateway process. Your proposal should include a title and give a brief outline of the project and be no more than 500 words.

Documents;

- Work-based project & interview
- Work based project proposal EXAMPLES
- Work-based project Work-based project resource
- ANNEX a Work based project interview grade descriptors table
- ANNEX b Work-based project checklist (Level 3 Customer Service Specialist) *Separate Annex THIS is what you will need to complete and return to us*

Work-based project & interview

Apprentices will be required to undertake a work-based project over a **two month** period which will commence following the approval of the project proposal by the Independent End-point Assessor. The End-point Assessment will comprise of an assessment of the work-based project written report supported by an interview. The aim of the work-based project is to identify any area within the apprentice job role / area of the business that requires a recommendation for change to improve customer service.

The proposal should outline **the intention to carry out a research and recommendation project for an area of the business which requires a recommendation for change to improve customer service.**

The apprentice should discuss the subject of the project in advance with their employer/training provider to confirm appropriateness for the business and its relevance to their role.

The work-based project proposal

The proposal should give a brief outline of the project and be **no more than 500 words** using the template provided

The project proposal form is to be completed to state how the apprentice will carry out research, gather data and information.

The apprentice will state how they will use and present the data that will enable them to advise recommendation(s) for improvement to customer service.

Recommendation(s) on how to improve customer service provision will be identified from the research conducted during the project completion and **must NOT** have been identified at the project proposal stage.

The work-based project **must NOT** be started until the project proposal has been accepted by the Independent End-point Assessor.

The work-based proposal must state **ALL** of the following:

1. The area within the apprentice job role / business that they have identified as requiring possible improvement to their customer service provision
2. A clear project title
3. How the apprentice will gather information on their organisation's customer types, needs and expectations
4. How the apprentice will communicate with customers to gain information on their journey and challenges of their end to end experience
5. How the apprentice intends to gather data and obtain customer feedback (qualitative and quantitative using a variety of methods)
6. How the apprentice intends to analyse, use and present the data gathered to inform recommendation(s) for continuous improvement to customer service.

Once approved the apprentice has up to **two months** to complete the project and submit their work-based project report **two weeks** prior to the interview date previously agreed

Undertaking the work-based project

During the two months allocated to complete the project the apprentice will undertake the activities and gather relevant evidence as outlined within the approved project proposal.

Apprentices should refer to the grade descriptors table (with pass/distinction) **ANNEX a** when working on the project.

The work-based project report

The final written work-based project report must **be 2500 words (+/- 10%)**, excluding annexes.

This must be **submitted two weeks prior to the planned EPA date**, accompanied by the completed '**Work-based project - Evidence Reference Form**'.

The report should contain annexes that are attributable to the apprentice and the actions they took. Example evidence could include mission statement, emails, letters, meeting notes, call logs, workflow documents, feedback etc.

The final written project report should document a specific high-level challenge covering the following:

- The impact of the organisation's mission statement and business strategy on customer service delivery
- Roles/functions within the organisational structure and their influence on customer service delivery
- Business processes that support the best outcome for customers and the organisation
- Importance of effective communication among functions/others in providing good customer service.
- Internal and external factors influencing the business environment and culture
- Research and analysis of information about the types of customers the organisation has and their needs and expectations
- Customer journeys and how these are managed to ensure successful outcomes
- Evidence of customer feedback collected through a variety of methods and evaluation of how the customer service delivery meets their potential needs and expectations
- use of the qualitative and quantitative customer experience data

- Potential causes of service failure and the consequences of these recommendations for future improvement(s) to the customer service provision/ delivery to include:

- the steps that would be required to implement change/improvement(s)
- how analysis of data has been used to inform recommendations
- show when and where there is input from others
- The benefit this change/improvement(s) could have on the organisation and their own role.
- consideration of current legislation, compliance and regulatory guidance
- How to communicate recommended change/improvement(s) to others and evidence of when decisions and recommendations were made to improve own customer service delivery.

The project should successfully demonstrate the required knowledge, skills and behaviours as listed in the 'Grade descriptors table' [ANNEX 3](#)

EXAMPLES

Level 3 Customer Service Specialist

Example 1 - Assessment 702/752: Work based project proposal

Apprenticeship standard	Level 3 Customer Service Specialist		
Apprentice name	Apprentice 1	Enrolment number	ABC1234
Project title and proposed content			
<i>Note: Please ensure that this is a maximum of 500 words</i>			
<p><u>Improving the customer service experience for customers accessing pet treatment services at the Hill View Veterinary Practice</u></p> <p>The objective of the project is to identify whether improvements can be made to the quality and speed of customer service given to different customer groups, based on a customer complaint regarding the miscommunication of their pet's diagnosis and the subsequent bill that was charged. (WB2, WB13)</p> <p>I will develop a questionnaire that customers will complete in writing or electronically (using an iPad in our reception area). Customers will be asked to rate and comment on their customer service experience with focus on communication of diagnosis, cost of treatment and suggest recommendations for improvement. I will create a spreadsheet to enter the results of the questionnaires. (WB3, WB4, WB8, WB12)</p> <p>I will also interview staff to gather their opinions on potential customer service improvements. I will create posters to inform customers that a survey is being delivered to customers visiting our veterinary surgery. (WB3, WB4, WB6, WB7, WB12)</p> <p>A detailed analysis of the following data will take place to support and inform my recommendations going forward:</p> <ul style="list-style-type: none"> - Customer's complaint including: <ul style="list-style-type: none"> o the customer's journey (WB4, WB9) o factors involved in the service failure (I.T. errors, staffing) (WB5, WB9) o the role each department played. (WB7, WB12) - Current process and procedure for dealing with complaints. (WB1, WB5) - Staff training (including induction for new starters). (WB6) - Feedback from questionnaires conducted. (WB4, WB9, WB10, WB12) - Customer complaints received in the past six months. (WB4, WB9, WB10, WB12) - Compliance to company values. (WB6, WB7) - Types of customers that visit our surgery. (WB9, WB11) <p>I will evaluate the complaint including the challenges the customer faced from the start of their customer journey with us, the business processes that underpinned our delivery and the role each department played in the customer's experience that led to the complaint. (WB2, WB4, WB7, WB9, WB12)</p>			

This, along with my findings from my research into the topics listed above will be used as the basis to recommend and implement service-related changes for the future. I will consider relevant legislation, regulations, and industry best practice when making my recommendations to my manager. (WB1, WB2, WB5, WB8, WB13, WB14)

Employer/training provider declaration:

I confirm that the project title and scope is appropriate for the business, it covers a specific high level challenge, and it has been produced by the apprentice:

Employer	<i>Manager 1</i>	Date	10/07/2020
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For City & Guilds use only - Project approval

- ☐ Approval of this project is agreed subject to the apprentice meeting the requirements of coverage of the KSBs assigned to this assessment method
- ☐ Approval of this project is rejected on the basis that insufficient information was provided to show that coverage of the KSBs assigned to this assessment method could be met

Independent End-point Assessor	<i>IEPA 1</i>	Date	10/07/2020
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Level 3 Customer Service Specialist

Example 2 - Assessment 702/752: Work based project proposal

Apprenticeship standard	Level 3 Customer Service Specialist		
Apprentice name	Apprentice 1	Enrolment number	ABC1234
Project title and proposed content			
<i>Note: Please ensure that this is a maximum of 500 words</i>			
<p><u>Review of service standards following Covid-19</u></p> <p>This proposal will summarise how I intend to review the adaptations and revisions required to our customer service delivery and practices due to the Covid-19 pandemic. I will evaluate the impact on our customer's experiences and how we will need to adapt our processes and procedures to ensure that their expectations continue to be met by our products and services. (WB2, WB3, WB4, WB5)</p> <p>The review will be conducted over a five-week period and will take into account the new legislation and guidelines laid out by the government to ensure employee and customer safety. How these could be implemented and the adaptations required to our business processes to ensure a positive customer experience and the best outcome for Crest Print Services will be the main focus of my project.</p> <p>Project plan:</p> <p>Week commencing:</p> <ul style="list-style-type: none"> • 23/03/20 Review and analyse current business processes, structure, and culture. Draft suggested adaptations taking into account new guidelines. (WB5, WB6, WB7) • 06/04/20 Conduct surveys with: <ul style="list-style-type: none"> ○ Suppliers and customers on the impact of their customer experience and customer journey since the pandemic. (WB4, WB9, WB10, WB11, WB12) ○ Colleagues on suggested improvements based on their experience and concerns. (WB5, WB9, WB10) • 20/04/20 Analyse data and information and identify recommendations. (WB3, WB8) • 27/04/20 Compile PowerPoint presentation to SMT with findings and recommendations. (WB3, WB8) • 04/05/20 Present findings to SMT and at team meeting to agree actions. (WB13, WB14) • 11/05/20 complete project report for apprenticeship. <p>I intend to make recommendations to the Senior Management Team following my research to ensure all standards are being maintained so that customers are still getting a high-quality product, great service and an enjoyable customer journey. This will include any potential changes to our current business strategy and future service-related decisions. (WB1, WB2, WB3, WB5, WB8, WB9, WB13, WB14)</p>			

Employer/training provider declaration:

I confirm that the project title and scope is appropriate for the business, it covers a specific high level challenge and it has been produced by the apprentice:

Employer	<i>Manager 2</i>	Date	10/07/2020
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 For City & Guilds use only - Project approval

☐ Approval of this project is agreed subject to the apprentice meeting the requirements of coverage of the KSBs assigned to this assessment method

☐ Approval of this project is rejected on the basis that insufficient information was provided to show that coverage of the KSBs assigned to this assessment method could be met

Independent End-point Assessor	<i>IEPA 2</i>	Date	10/07/2020
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The independent end-point assessor (IEPA) will review the suitability of your work-based project proposal and record their comments. You will be informed of the suitability of your project proposal, and this will be recorded on the work-based project proposal form you originally submitted.

Once approved, you have up to two months to complete the project and submit it two weeks prior to the agreed interview date. Your employer/training provider will ensure you have sufficient time and the necessary resources to plan and undertake the research and produce your written report.

Please note you must not start your project until it has been approved by the IEPA.

Work-based project

Resources

Range	Potential evidence/annexes
The impact of the organisation's mission statement and business strategy on customer service delivery	https://www.lynxtruss.co.uk/mission-statement/ https://corp.yonyx.com/customer-service/18048/ https://dynamicbusiness.com/featured/delivering-meaning-to-mission-statements-08072014.html https://www.mckinsey.com/business-functions/growth-marketing-and-sales/our-insights/developing-a-customer-experience-vision
Roles/functions within the organisational structure and their influence on customer service delivery	https://www.indeed.com/career-advice/career-development/customer-service-organizational-structure https://smallbusiness.chron.com/customer-service-organization-structure-2760.html https://www.slidebooks.com/products/operating-model-and-organization-design-toolkit?variant=39698669469778&qclid=EAlaIQobChMIwJXqm4Ln-AIVkbbtCh1hzg_BEAMYASAAEgLYDPD_BwE https://scholar.google.co.uk/scholar?q=functions+within+the+organisational+structure+and+their+influence+on+customer+service+delivery&hl=en&as_sdt=0&as_vis=1&oi=scholar
Business processes that support the best outcome for customers and the organisation	https://processbliss.com/business-processes/ https://blog.processology.net/what-is-business-process-improvement https://blog.processology.net/5-ways-business-process-management-helps-improve-customer-service

Importance of effective communication among functions/others in providing good customer service	https://scholar.google.co.uk/scholar?q=Importance+of+effective+communication+among+functions+in+providing+good+customer+service&hl=en&as_sdt=0&as_vis=1&oi=scholar https://smallbusiness.chron.com/effective-communication-customer-service-4806.html https://www.vocalcom.com/blog/7-rules-for-effective-customer-service-communication/
Internal and external factors influencing the business environment and culture	https://scholar.google.co.uk/scholar?q=Internal+and+external+factors+influencing+the+business+environment+and+culture&hl=en&as_sdt=0&as_vis=1&oi=scholar https://www.mageplaza.com/blog/what-are-internal-external-environmental-factors-that-affect-business.html https://hi.hofstede-insights.com/organisational-culture?utm_source=adwords&utm_medium=ppc&utm_term=what%20is%20organizational%20culture&utm_campaign=Organisational+culture&hsa_tgt=kwd-422621576062&hsa_net=adwords&hsa_cam=1156261367&hsa_mt=b&hsa_src=g&hsa_kw=what%20is%20organizational%20culture&hsa_acc=9476758808&hsa_grp=53818755075&hsa_ver=3&hsa_ad=519329853527&qclid=EAlaIqobChMI-s-x1oPn-AIV1IBQBh3dZQWaEAMYAAEglzKPD_BwE

Level 3 Customer Service Specialist

Assessment 702/752 **Work based project interview grade descriptors table**

Standard module	City & Guilds Ref	Assessment requirement	Pass descriptors	Distinction descriptors
Business knowledge and understanding	WB1	Understand your organisation's current business strategy in relation to customers and make recommendation for its future.	Evidence that they understand the impact of the organisation's mission statement and business strategy on customer service delivery and make recommendations for future improvements.	Evidence to support their research and analysis of customer service standards and mission statements of other organisations, in comparison to their own organisations, to inform their recommendations.
				Ability to consider the possible impact on their organisation of not considering the future in decision-making.
	WB2	Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation	Ability to recommend improvement to the customer service provision, the steps required to implement this change and the benefit this change could have on the organisation and their own role.	Demonstrates an ability to identify trends/recurring issues and analyse why they occurred and record possible ways of addressing them to ensure they do not reoccur.
			Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.	
	WB3	Understand the principles and benefits of being able to think about the future when taking action or making service related decisions	Ability to recommend improvement to the customer service provision, the steps required to implement this change and the benefit this change could have on the organisation and their own role.	Ability to consider the possible impact on their organisation of not considering the future in decision-making.

Customer journey knowledge	WB4	Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience	Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.	Demonstrates how knowing their customer and their needs has a direct impact on: <ul style="list-style-type: none"> a. their working practices b. organisational policy/procedures
	WB5	Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation	An understanding of the underpinning business processes that support them on bringing about the best outcome for customers and their organisation.	Demonstrates how knowing their customer and their needs has a direct impact on: <ul style="list-style-type: none"> a. their working practices b. organisational policy/procedures
Customer service culture and environment awareness	WB6	Understand your business environment and culture and the position of customer service within it	Ability to discuss the internal and external factors influencing their business environment and culture.	Ability to demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation.
			Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery.	

	WB7	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	Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery.	Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s).
			Ability to identify potential causes of service failure and the consequences of these.	
Business focused service delivery	WB8	Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice	Evidences when they made decisions and recommendations to improve their own customer service delivery.	N/A
Providing a positive customer experience	WB9	Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction	Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.	N/A
			Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.	

Working with your customers /customer insights	WB10	Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it	Provides evidence to show how they identify information which can be used by their organisation to provide customer insight and identify how this information can be analysed, used and presented.	Provides evidence to show when they analyse the risks and opportunities to implementing change.
				Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended alternative methods likely to improve results, stating reasons for choice.
Working with your customers /customer insights	WB11	Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service	Provides evidence to show how they identify information which can be used by their organisation to provide customer insight and identify how this information can be analysed, used and presented.	Demonstrates how knowing their customer and their needs has a direct impact on: a. their working practices b. organisational policy/procedures
			Ability to gather and analyse information about the types of customers their organisation has and explain how the service they provide meets their potential needs and expectations.	
Service improvement	WB12	Analyse the end to end service experience, seeking input from others where required supporting development of solutions	Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.	N/A

Service improvement	WB13	Make recommendations based on your findings to enable improvement	Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.	Demonstrates an ability to identify trends/recurring issues and analyse why they occurred and record possible ways of addressing them to ensure they do not reoccur.
			Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required.	
Service improvement	WB14	Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice	Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.	Ability to demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation.