

The Swarm Training Programme

Customer Service Specialist

Level 3



A Customer Service Specialist will develop a more commercial mindset, understand the needs of the business and think creatively in helping to develop the customer focused area of the business.

The Programme

The main purpose of a customer service specialist is to be a 'professional' for direct customer support within all sectors and organisation types. You are an advocate of Customer Service who acts as a referral point for dealing with more complex or technical customer requests, complaints, and queries. You are often an escalation point for complicated or ongoing customer problems.

As an expert in your organisation's products and/or services, you share knowledge with your wider team and colleagues. You gather and analyse data and customer information that influences change and improvements in service.

Utilising both organisational and generic IT systems to carry out your 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 customer service point.

Level: Level 3.

Duration: 14 Months. of learning plus up to 12 weeks of End Point Assessment Process.

Delivery Model:

- Hybrid of classroom workshops and remote webinars (depending on number of learners).
- One on One monthly mentoring and tutoring sessions to support in application of knowledge, skills and behaviours.

The Standard

Apprenticeship standards are based on occupational standards. An occupational standard is a short and concise document that describes what someone who is competent in the occupation normally does – ‘duties’, and the ‘knowledge, skills and behaviours’ (KSBs) required to carry out these duties competently; along with any qualifications that must be taken and alignment with professional recognition if applicable.

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 current business strategy in relation to customers and make recommendations for its future.
- 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.

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.
- Understand how to find and use industry best practice to enhance your own knowledge.

Skills

Business-Focused Service Delivery:

- Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice.
- Resolve complex issues by being able to choose from and successfully apply 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.

Providing a Positive Customer Experience (cont.):

- 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.

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.

Behaviours

Develop 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.
- Exercises proactivity and creativity when identifying solutions to customer and organisational 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.

Delivery Timeline

Phase 1: On Programme Training and Learning

Developing the Knowledge:

The knowledge training is primarily delivered via monthly virtual classroom workshops & webinars (where multiple people in an organisation are enrolled) or 121 via tuition. The content of this is based on the main knowledge outcomes above that provide a depth of understanding for the skills.

Employer collaboration/involvement is key to supporting some of the workshops/content as many will need to be bespoke to meet the employer specifics.

Resources and learning materials are provided.

Skills Development and Portfolio Building

Evidence to demonstrate the performance of knowledge, skills and behaviours will be supported via 121 tuition and mentoring with evidence collected via our E portfolio system.

The development of the skills aims will be done throughout the programme and evidence of performance will be gathered to create a showcase portfolio required by the End Point Assessment.

Reviews

Every twelve weeks the tutor will conduct a progress review with the learner and line manager to support in keeping the progress on track, identify any issues and plan the next phase of collaborative learning.

English & Maths

Apprentices without level 2 English and maths will need to achieve this level prior to taking the End-Point Assessment. 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. A British Sign Language (BSL) qualification is an alternative to the English qualification for those whose primary language is BSL.

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Phase 2: Gateway and End-Point Assessment

Gateway

When all learning has been completed and evidence in the portfolio has been gathered, the next process is to conduct the Gateway review. The gateway review is when the learner, employer and provider agree the learners readiness to progress to End point Assessment.

EPA Gateway Requirements

Completion of the off-the job learning components of the programme.

Confirmation from the employer that the apprentice is ready. It is recommended that the training provider is consulted by the employer to inform the decision.

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Completion of a portfolio of evidence

The End-Point Assessment Process

The EPA consists of 3 distinct assessment methods.

- Practical Observation.
- Work-Based Project.
- Professional Discussion.

The EPA must be completed within a 20-week period, after the apprentice has met the EPA gateway requirements. Assessment methods can be completed in any order, allowing EPAOs flexibility in scheduling and cost-effective allocation of resources. EPAOs must ensure that each assessment method is scheduled for an apprentice within their maximum 20-week EPA period. It is recommended that the professional discussion and examination components be completed on the same day however this is not a requirement. The full details of the end assessment plan can be found on institute of apprenticeships website.

Employer Support:

- Dedicated Senior Account Manager
- Quarterly Cohort Reviews with Senior Account Manager
- Employer Showcase in Swarm media and news
- Access to view Learners progress via our E-portfolio

Costs:

Full Apprenticeship Cost Per Learner:
£4000

(Maximum Funding Band)

For more information please don't hesitate to contact us.

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