

Apprentice Preparation Guide



Professional Discussion

Assessment Method: Professional Discussion Underpinned by a Portfolio of Evidence

Preparing for your End-point Assessment

This document is designed to support you in preparing for the VTCT Skills Level 3 Customer Service Specialist v1.1 End-point Assessment.

During your End-point Assessment, **one** of the **three** assessment methods that you will undertake is a Professional discussion.

You will use the portfolio of evidence you collated during the on-programme stage of the apprenticeship standard, which will be submitted at the Gateway stage, to support the professional discussion.

Overview of a Professional Discussion

A professional discussion is an assessment method which is a planned, in-depth, two-way conversation between the Independent Assessor and yourself. It is an effective way of assessing your complex understanding and knowledge.

Delivery of the Professional Discussion Underpinned by a Portfolio of Evidence

The professional discussion will be conducted as follows:

- a 1:1 conversation, with no other parties involved
- completed in an appropriate environment which is free from distractions and interruptions
- you and the Independent Assessor may refer to your Portfolio of evidence to support the Professional discussion

Where will the Professional Discussion Underpinned by a Portfolio of Evidence take place?

The professional discussion underpinned by a portfolio of evidence will take place in your employer's workplace or your training provider's premises. The professional discussion may be conducted remotely by video conferencing.

The professional discussion should take place in a quiet room, free from distractions and influence, in a controlled environment.

- **What is a controlled environment?** *A controlled environment for an assessment refers to a setting where specific conditions are monitored to ensure fairness, security, and reliability in the assessment process across apprentices.*

The Professional discussion will include:

- A structured discussion lasting **60 minutes** (with a 10% +/- tolerance) with you and your VTCT Skills Independent Assessor, who will conduct this assessment either remotely or face to face, in a controlled environment.

You can refer to and illustrate your answers with evidence from your portfolio of evidence; however, the portfolio of evidence is not directly assessed.

Please note: the professional discussion will be recorded for quality and safeguarding purposes.

Portfolio of Evidence

The portfolio of evidence that you complete during the on-programme stage is not assessed or graded by the Independent Assessor; however, it is used to inform your professional discussion.

The criteria for the Portfolio of evidence is as follows:

- The content must be sufficient to evidence that you can demonstrate all of the Knowledge, Skills and Behaviours mapped to the professional discussion assessment method. An example of how the evidence can be mapped to the Knowledge, Skills and Behaviours, can be found in Appendix 1.
- Your Portfolio of evidence can be in any format, as long as it is legible and can be uploaded electronically to epaPRO.
- The 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.
- Evidence sources may include workplace documentation and records, for example, workplace policies and procedures, witness statements and annotated photographs. Progress review documentation and feedback from colleagues and/or customers can also be included. This is not a definitive list; other evidence sources can be included.
- One piece of evidence can be mapped against more than one Knowledge, Skill or Behavioural requirement.
- A completed 'VTCT Skills Level 3 Customer Service Specialist Portfolio of Evidence Mapping Document' (Appendix 1) is required to be uploaded alongside your Portfolio of Evidence.
- A declaration of authenticity on the 'Portfolio of Evidence Mapping Document' (example Appendix 1) must be signed by yourself, your training provider and your employer alongside the Portfolio of Evidence submitted.
- The portfolio of evidence must be submitted by upload, to the EPA Pro system at the Gateway stage.
- VTCT Skills will send the portfolio of evidence to the Independent Assessor at least two weeks prior to the professional discussion.
- You should not include reflective accounts or self-evaluation documentation as evidence within your portfolio of evidence.

Preparation for a Professional Discussion

During the professional discussion, you must demonstrate a proficient understanding of the requirements for the technical skills outlined in the End-point Assessment Plan.

To prepare for the professional discussion, it is essential that the grade descriptors on pages 5-6 are considered. The grade descriptors include areas that must be covered throughout the Professional discussion.

During the professional discussion, the Independent Assessor will allow you to lead the discussion and to make reference to your portfolio of evidence.

When completing the professional discussion, you will:

- describe activities that you completed from your portfolio of evidence. You will discuss each activity in its entirety covering all applicable KSBs
- describe your understanding of your job role, duties and responsibilities, specific parts of the training you have received, your personal development, and reflection on the training you have received.

How is the Professional Discussion Graded?

The Independent Assessor will use the grading criteria to assess the professional discussion. The Professional Discussion will be graded Fail/Pass/Distinction.

Professional Discussion Grading Criteria

Fail criteria

Grading descriptors - Professional discussion supported by portfolio evidence
The Apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria.
Does not understand the content and importance of the organisation's service level agreement.
Demonstrates limited knowledge and understanding of whom the internal and external customers are and their expectations.
Provides no knowledge and understanding of leadership styles.
Gives ineffective evidence of personal learning and development goals and shows no understanding of how they can be achieved.

Pass criteria

You will achieve a pass grade if you provide evidence to meet all the Knowledge, Skills and Behaviour requirements set out for the professional discussion and all of the criteria below:

Grading descriptors - Professional discussion supported by portfolio evidence
Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments.
Evidence of how they identify the different types of leadership styles that work best in their customer environment.
Demonstrates when they have balanced the meeting of their customer and their organisation's needs while showing they have considered cost implications.
Demonstrate sharing own knowledge and experience with others, to support colleague development.
Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.
Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.
Evidence knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations.
Demonstrates responsibility and ownership in resolving customer issues, by getting the right people involved and delivering on promises, to the satisfaction of the customer and their organisation.
Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.
Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.

Evidence knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development.

Provides evidence to demonstrate how they have achieved learning and development goals, identified in an agreed personal development plan, in relation to their knowledge and skills of customer service, in the industry and best practice.

Distinction criteria

You will achieve a distinction grade for the professional discussion if you provide evidence to meet all the pass criteria and also all of the additional criteria below:

Grading descriptors - Professional discussion supported by portfolio evidence

Evidence when they have assessed the impact of sharing their own knowledge on:

- a. their development
- b. colleague development.

Evidence when they have analysed the importance of their professional image and its relationship with the organisation's brand.

Demonstrates how they evaluate, and review improvements made to their own customer service to ensure a future-focused approach.

Please follow the guide outlined below to support your preparation

What can I do to prepare for my End-point Assessment?	Completed Yes/No
1. Access and familiarise yourself with the Mock Assessment Form for the Professional discussion.	
2. Refer to the Knowledge, Skills and Behaviours that may be assessed during the Professional discussion. These are outlined in the table below.	
3. Collate pieces of evidence for your Portfolio of Evidence that demonstrate the relevant Knowledge, Skills and Behaviour which will be discussed in your Professional discussion.	
4. Collaborate with others to seek constructive feedback on your performance.	
5. Practice questions and answers with peers/assessors in preparation for your Professional discussion using the sample questions provided.	
6. Incorporate any feedback from your peers/assessor to enhance your approach and to address any identified areas for improvement in readiness for your Professional discussion.	
7. Practise effective time management during the Professional discussion. Allocate appropriate time to each task and ensure completion within the given timeframe.	
8. Approach the Professional discussion with confidence. Remember that it is an opportunity to showcase your knowledge and skills.	
9. Stay calm under pressure and communicate effectively throughout the Professional discussion.	
10. Remember to bring your identification with you on the day of your End-point Assessment. This can be one of the following: <ul style="list-style-type: none"> • Driving licence • Employee ID • Passport 	

Planning and Preparing for your Professional Discussion

Knowledge

Business, knowledge and understanding	What do I need to remember?
Understand the impact your service provision has on the wider organisation and the value it adds	
Understand a range of leadership styles and apply them successfully in a customer service environment	
Customer journey knowledge	
Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention	
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 what drives loyalty, retention and satisfaction and how they impact on your organisation	
Customer service culture and environment awareness	
Understand how to find and use industry best practice to enhance own knowledge	

Skills

Business focused service delivery	What do I need to remember?
Resolve complex issues by being able to choose from and successfully apply a wide range of approaches	
Providing a positive customer experience	
Demonstrate a cost-conscious mind-set when meeting customer and the business needs	

Behaviours

Develop self	What do I need to remember?
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	
Make realistic promises and deliver on them	
Team working	
Share knowledge and experience with others to support colleague development	

Following your End-point Assessment:

What happens following my End-point Assessment?	You will receive the results from your End-point Assessment within 10 working days.
What happens if I do not achieve my End-point Assessment?	If you do not achieve a pass result within this assessment method, you will be able to re-sit this assessment.

Appendix 1 - Professional Discussion Mapping Document with a Declaration of Authenticity

Professional Discussion Mapping Document VTCT Skills Level 3 Customer Service Specialist

All columns of this mapping document are to be completed prior to the gateway stage and submitted with the portfolio of evidence (minimum of 10 pieces of evidence to a maximum of 15 pieces) for each apprentice. Please refer to the 'End-point Assessment Guidebook' and the 'Professional Discussion Apprentice Guidance' Document when completing this document.

Please note: It is a requirement of the training provider to submit all the evidence electronically, via the 'Documents tab' on the apprentice's dashboard within the e-APPO system. This must be in a scanned format, allowing the evidence package to be viewed remotely. VTCT Skills will not accept a link to an apprentice's individual e-portfolio.

Evidence number	KSBs:	Knowledge, Skills and Behaviours criteria:	Type of evidence submitted:	Reference number:
Example:				
1	Behaviours: Develop self	Proactively keep your service, industry and best practice knowledge and skills <u>up-to-date</u>	<i>Evidence of CPD</i>	1.1
2	Knowledge: Customer journey knowledge	Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention	<i>Referral for escalation evidence</i>	1.2
	Knowledge: Business knowledge and understanding	Understand the impact your service provision has on the wider organisation and the value it adds		
	Knowledge: Business knowledge and understanding	Understand a range of leadership styles and apply them successfully in a customer service environment		
	Knowledge: Customer journey knowledge	Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention		

Declaration of Authenticity

The work submitted for the portfolio of evidence must be the Apprentice's own work. Should this evidence be copied from someone else or plagiarised in any other way, the Apprentice's End-point Assessment result may be void.

Apprentice Declaration

I confirm that all of the evidence submitted to VTCT Skills for my professional discussion is my own work.

Apprentice name:	
Apprentice signature:	
Date:	

Training Provider/Employer Declaration

The following declaration can be provided by the training provider or the employer.

I have authenticated the Apprentice's work, and I am satisfied that to the best of my knowledge, the work submitted is solely that of the Apprentice.

Training provider/ employer name:	
Training provider/ employer signature:	
Date:	

Document History

Version	Issue Date	Changes	Role
v1	04/02/2025	First published	Qualification Development Manager