

Mock Assessment Form

Level 3 Customer Service Specialist (ST0071 v1.1)

Assessment Method: Work-based project supported by an Interview

This Mock Assessment Form has been developed to support the tutor in preparing the Apprentice for their Interview during their End-point Assessment for Customer Service Specialist – **ST0071 v1.1**.

Grading criteria

Theme: Business Knowledge and Understanding			
Grading criteria		Achieved Yes/No	Comments
Pass	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.		
Pass	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.		
Distinction	Ability to demonstrate the importance of assessing the political, economic, social, technical, legal and environmental factors that influence the operation of their organisation.		
Distinction	Evidence to show when they have proactively gathered customer feedback, through a variety of methods and used alternative recommendations to change the customer service level agreement in order to provide an improved service.		

Sample Questions: Pass Criteria

(K) Understand your organisation's current business strategy in relation to customers and make recommendation for its future		
What other organisations mission statements are you aware of (give examples) and how have you used these to suggest recommendations in your own organisation?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
What recommendations would you make to your organisation's business strategy to improve customer relations?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
(K) Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation		
What internal and external factors may influence future customer service improvements?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Explain how continuous improvements positively impact your organisation.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Sample Questions: Distinction Criteria

(K) Understand your organisation's current business strategy in relation to customers and make recommendation for its future		
How does understanding political, economic, social, technical, legal and environmental factors help your organisation to make recommendations for the future?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Explain the importance of assessing technical/legal/environmental factors help your organisation to identify threats and opportunities. Provide examples of these factors.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
(K) Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions		
What are the benefits of future-focused customer service and what could be the negative impact of not being future focused?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe the benefits of considering the future when making customer service-related decisions? Give examples.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Customer Journey knowledge			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes.		
Pass	An understanding of the underpinning business processes that support them on bringing about the best outcome for customers and their organisation.		
Pass	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.		

Sample Questions: Pass Criteria		
(K) Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience		
Describe different techniques that could be used to critically evaluate customer challenges within their journey.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Can you provide an example of how a customer challenge has impacted on their customer journey?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
(K) Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation		
Describe how knowing your customer can have a direct impact on your working practice and the organisation policies and procedures.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

In your organisation, what are your underpinning business processes that support you to bring about the best outcome for customers?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Can you identify information which can be used by your organisation to provide customer insight?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Customer Service Culture and Environment Awareness			
Grading criteria		Achieved Yes/No	Comments
Pass	Ability to discuss the internal and external factors influencing their business environment and culture.		
Pass	Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.		
Pass	Ability to identify potential causes of service failure and the consequences of these.		

Sample Questions: Pass Criteria			
(K) Understand your business environment and culture and the position of customer service within it			
How does your role support the business environment and culture?			Yes <input type="checkbox"/> No <input type="checkbox"/>
What are the main internal and external factors influencing your business environment and culture?			Yes <input type="checkbox"/> No <input type="checkbox"/>
(K) 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			
Give me an example of how different departments support customer service and what are consequences if departments don't work together?			Yes <input type="checkbox"/> No <input type="checkbox"/>
What are the potential consequences to your organisation if cross-department communication is ineffective?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Explain your organisation's structure and what role each department needs to play in delivering Customer Service.			Yes <input type="checkbox"/> No <input type="checkbox"/>

Theme: Business Focused Service Delivery			
Reference to assessment requirements (Knowledge and Skills)		Achieved Yes/No	Comments
Pass	Evidences when they made decisions and recommendations to improve their own customer service delivery.		
Distinction	Ability to identify and recognise when problems reoccur and discuss these reoccurring problems with others and recommend appropriate change(s).		

Sample Questions: Pass Criteria			
(S) Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice			
Give an example of when you have made a decision and provided recommendations and advice to improve customer service delivery.	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
Describe how you would make decisions and provide advice to improve customer service.	Yes	<input type="checkbox"/>	No <input type="checkbox"/>

Sample Questions: Distinction Criteria			
(S) Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice			
Can you describe how you recognise reoccurring problems and how you would go about recommending change?	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
Who would you discuss reoccurring problems with and how would you recommend appropriate change(s).	Yes	<input type="checkbox"/>	No <input type="checkbox"/>

Theme: Providing a Positive Customer Experience			
Reference to assessment requirements (Knowledge and Skills)		Achieved Yes/No	Comments
Pass	Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements.		

Sample Questions: Pass Criteria			
(S) Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction			
How is customer data used and presented to achieve a positive result for customer satisfaction?	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
Describe how customer information is analysed, used and presented to achieve customer satisfaction.	Yes	<input type="checkbox"/>	No <input type="checkbox"/>

Theme: Working With Your Customers / Customer Insights			
Reference to assessment requirements (Knowledge and Skills)		Achieved Yes/No	Comments
Pass	Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.		
Pass	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.		
Pass	Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.		
Distinction	Evidences when they evaluated the strengths and weaknesses of feedback methods used and recommended alternative methods likely to improve results, stating reasons for choice.		
Distinction	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 		

Sample Questions: Pass Criteria

(S) Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it

How do you and your organisation gather and analyse information about your types of customers - and explain how the service you provide meets the customers potential needs and expectations?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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Describe how the service your organisation provides meets the customers potential needs and expectations.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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How does your organisation critically analyse the quantitative and qualitative data it has gathered?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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Sample Questions: Distinction Criteria

(S) Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it

Can you provide any examples of when you and your organisation have been proactive in evaluating the strengths and weakness of your methods of gathering customer feedback?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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Describe how you use your expertise to recommend alternative feedback methods to help improve results and the reasons for your recommendations.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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(K) Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service

Provide an example of when you have had to anticipate customer needs and expectations.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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Describe how knowing your customer and their needs impacts your working practices and your organisation's policy/procedures	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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Theme: Service Improvement			
Reference to assessment requirements (Knowledge and Skills)		Achieved Yes/No	Comments
Pass	Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery.		
Pass	Evidences the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required.		
Pass	Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.		
Distinction	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.		
Distinction	Ability to consider the possible impact on their organisation of not considering the future in decision-making.		
Distinction	Provides evidence to show when they analyse the risks and opportunities to implementing change.		
Distinction	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.		

Sample Questions: Pass Criteria

(S) Analyse the end-to-end service experience, seeking input from others where required supporting development of solutions

How do you communicate with customers to gain information and feedback on their experience?

Yes No

Provide examples of when you have analysed an end-to-end service experience.

Yes No

(S) Make recommendations based on your findings to enable improvement

Describe how your organisation analyses data to recommend continuous improvement?

Yes No

Can you give any examples on how you have made recommendations for service improvements, based on your findings?

Yes No

(S) Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice

How do you make recommendations and implement change in line with new and relevant legislation, regulations and industry best practice?

Yes No

How do you take into consideration current legislation, compliance and regulatory guidance when making recommendations for change?

Yes No

Sample Questions: Distinction Criteria

(S) Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice

How do you support your research and analysis of customer service standards to inform change?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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How do you make recommendations for change to support your research?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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S) Make recommendations based on your findings to enable improvement

Describe how you present recommendations for change to your organisation and advise them of the impacts of not considering your recommendations.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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How would you analyse the risks and opportunities to implement change?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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How would you record reoccurring trends/issues and identify ways of addressing them?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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Document History

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