

Mock Assessment Form

Level 3 End-point Assessment for Customer Service Specialist

Assessment Method: Practical observation (with Q&As)

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

Grading criteria

Theme: Knowing your customers and their needs / Customer Insight			
Grading criteria		Achieved Yes/No	Comments
Pass	An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.		
Pass	Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.		

Sample Questions: Pass Criteria

(K) Understand different customer types and the role of emotions in bringing about a successful outcome

How do different customers and their emotions influence the outcome of a situation?

Yes No

How can you respond to different customer emotions to make sure the outcome is successful?

Yes No

Theme: Knowing your customers and their needs / Customer Insight			
Grading criteria		Achieved Yes/No	Comments
Pass	Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.		

Sample Questions: Pass Criteria			
(K) Understand how customer expectations can differ between cultures, ages and social profiles			
Explain how customer expectations can differ between cultures, ages and social profiles.			Yes <input type="checkbox"/> No <input type="checkbox"/>
Describe how culture, age and social profiles can affect customer expectations.			Yes <input type="checkbox"/> No <input type="checkbox"/>

Theme: Knowing your customers and their needs / Customer Insight			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrates how they analyse, use and present a range of information in order to provide customer insight.		

Sample Questions: Pass Criteria				
(K) How to analyse, use and present a range of information to provide customer insight				
Give me an example of when you have analysed, used and presented a range of information to provide customer insights.			Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe the term 'customer insights' and why they are important.			Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Customer service culture and environmental awareness

Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.		

Sample Questions: Pass Criteria

(K) Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver to customers		
Explain how laws and regulations impact your organisation's customer service.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe your understanding of the organisation, regulations and legislation, systems relating to Customer Service.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Providing a positive customer experience			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.		

Sample Questions: Pass Criteria		
(S) Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes		
How can advanced questioning, listening and summarising skills be used to negotiate mutually beneficial outcomes?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe the advanced communications skills you would use to achieve a mutually beneficial outcome.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Providing a positive customer experience			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction.		

Sample Questions: Pass Criteria		
(S) Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy		
Describe an example of when you have managed a challenging or complicated situation.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Give an example of when you have made recommendations or delivered changed, following a challenging or complicated situation.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Providing a positive customer experience			
Grading criteria		Achieved Yes/No	Comments
Pass	Recognises when customer emotions have been affected by the level of service offered.		

Sample Questions: Pass Criteria				
(S) Identify where highs and lows of the customer journey produce a range of emotions in the customer				
How can customer emotions be affected by the level of service offered?			Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe an example of when the highs and lows of a customer journey have produced a range of emotions from your customer.			Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Providing a positive customer experience			
Grading criteria		Achieved Yes/No	Comments
Pass	Evidences how they recognise when customer expectations are not met and demonstrates how, using appropriate communication techniques, this could be managed to maintain a positive relationship.		

Sample Questions: Pass Criteria		
(S) Use clear explanations, provide options and solutions to influence and help customers make choices and agree on the next steps		
How would you use advanced communication skills to maintain a positive relationship when a customer's expectations are not met?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Explain how you could maintain a positive relationship when a customer's expectations have not been met.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Providing a positive customer experience			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.		

Sample Questions: Pass Criteria				
(S) Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcomes in the relevant format				
Give an example when you use written and verbal communication to simplify and provide complex information that supports a positive customer outcome.			Yes <input type="checkbox"/>	No <input type="checkbox"/>
Explain how you adapt your communication style to clearly and concisely communicate complex information to customers to support positive outcomes.			Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Business-focused service delivery and Ownership / responsibility			
Grading criteria		Achieved Yes/No	Comments
Distinction	Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.		

Sample Questions: Distinction Criteria		
(S) Find solutions that meet your organisation's needs as well as the customer requirements		
Describe how you find solutions that meet your organisation's needs as well as the customer requirements.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe how you use your expertise to provide clear explanations and offer options to help your customers make choices that are mutually beneficial to both the customer and your organisation.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
(B) Personally, commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation		
Explain how you commit and take ownership to resolve customer issues to the satisfaction of the customer and your organisation.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe a time when you have personally taken ownership of a customer issue and resolved it to meet the satisfaction of both the customer and your organisation.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Customer Service Performance			
Grading criteria		Achieved Yes/No	Comments
Pass	Evidences when they have maintained a positive relationship even when they are unable to deliver the customer's expected outcome.		

Sample Questions: Pass Criteria			
(S) Maintain a positive relationship even when you are unable to deliver the customers expected outcome			
Describe a time when you have maintained a positive relationship even when you were unable to deliver the customer's expected outcome.	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
Describe how you remain positive when customer expectations are not met.	Yes	<input type="checkbox"/>	No <input type="checkbox"/>

Theme: Customer Service Performance			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.		

Sample Questions: Pass Criteria				
(S) When managing referrals or escalations take into account historical interactions and challenges to determine the next steps				
Explain how historical data can help determine the next steps to take with customer escalation.			Yes <input type="checkbox"/>	No <input type="checkbox"/>
Explain why you consider past interactions and challenges when managing referrals or escalations to decide the next steps.			Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Ownership/responsibility			
Grading criteria		Achieved Yes/No	Comments
Pass	Shows proactivity and creativity when identifying solutions to customer and organisational issues.		
Distinction	Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.		

Sample Questions: Pass Criteria				
(B) Exercises proactively and creatively when identifying solutions to the customer and organisation				
Can you provide an example of when you identified a customer's needs?			Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe a time when you have been proactive and creative when identifying solutions to customer and organisational issues.			Yes <input type="checkbox"/>	No <input type="checkbox"/>
Sample Questions: Distinction Criteria				
(B) Exercises proactively and creatively when identifying solutions to the customer and organisation				
Describe how you would provide additional solutions to customers and make recommendations based on your findings to enable improvement.			Yes <input type="checkbox"/>	No <input type="checkbox"/>
Explain how you personally ensure that a customer is satisfied with the outcome and provide examples how you may feed this back to colleagues within your organisation?			Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Ownership / responsibility			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures.		

Sample Questions: Pass Criteria		
(B) Personally, commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation		
Describe how you identify, negotiate and agree appropriate options with customers, and make realistic commitments.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe your communication techniques to resolve customer issues, to the satisfaction of both the customer and your organisation.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Team working			
Grading criteria		Achieved Yes/No	Comments
Pass	An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.		
Pass	Demonstrates achievement of results through effective teamwork and collaboration with colleagues at all levels.		

Sample Questions: Pass Criteria		
(S) Work effectively and collaboratively with colleagues at all levels to achieve results		
Describe how to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe a time when you have achieved results through effective teamwork and collaboration with colleagues at all levels.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Team working			
Grading criteria		Achieved Yes/No	Comments
Pass	Shows adaptability of own skills when working with internal customers.		

Sample Questions: Pass Criteria				
(B) Recognise colleagues as internal customers				
Give me an example of when you have adapted your own skills when working with internal customers to ensure effective teamwork?			Yes <input type="checkbox"/>	No <input type="checkbox"/>
Identify some examples of internal customers within your organisation.			Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Equality			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.		

Sample Questions: Pass Criteria		
(B) Adopt a positive and enthusiastic attitude being open-minded and able to tailor your service to each customer		
Give me an example of when you have adopted a positive and enthusiastic attitude and tailored your service to meet a customer needs.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe how you embed your company's policies and procedures to meet a customer's specific needs.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
(B) Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment		
Describe what strategies you have used to ensure customers' and organisational needs are met.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe how you have adapted the service yourself or as an organisation to meet a customer's specific need.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Presentation			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.		

Sample Questions: Pass Criteria			
(B) Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction			
Explain how you ensure you demonstrate brand advocacy values and belief when dealing with customer requests to build trust, credibility and satisfaction.	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
Describe how you implement your organisation's brand advocacy, values and beliefs.	Yes	<input type="checkbox"/>	No <input type="checkbox"/>

Theme: Presentation			
Grading criteria		Achieved Yes/No	Comments
Pass	Evidence to show how their personal presentation made a positive impact on their organisation's brand.		

Sample Questions: Pass Criteria		
(B) Ensure your personal presentation, in all forms of communication, reflects positively on your organisations		
Explain what you do, to ensure your personal presentation makes a positive impact on your organisation's brand.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe when you have used your communication skills to understand a customer's needs and how this helped you make recommendations to improve a service.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Document History

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