

Mock Assessment Form

Level 3 End-point Assessment for Customer Service Specialist

Assessment Method: Professional discussion underpinned by a portfolio of evidence

This Mock Assessment Form has been developed to support the tutor in preparing the Apprentice for their Professional Discussion 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	Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments.		
Pass	Evidence of how they identify the different types of leadership styles that work best in their customer environment.		
Distinction	Evidences when they have assessed the impact of sharing their own knowledge on: <ul style="list-style-type: none"> a. their development b. colleague development 		
Distinction	Evidences when they have analysed the importance of their professional image and its relationship with the organisation's brand.		

Sample Questions: Pass Criteria		
(K) Understand the impact your service provision has on the wider organisation and the value it adds		
Describe the impact your role can have on other departments.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
How can sharing your knowledge contribute to both your own development and the development of your colleagues?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
(K) Understand a range of leadership styles and apply them successfully in a customer service environment		
Describe how sharing your knowledge can contribute to both your own development and the development of your colleagues.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe how you would identify the best leadership style to use in your working environment.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe common leadership styles and how you would apply these in your role.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Sample Questions: Distinction Criteria		
(K) Understand the impact your service provision has on the wider organisation and the value it adds		
Tell me how your professional image can impact your organisation's brand.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Why is your professional image important for your organisation's brand?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Customer Journey knowledge			
Grading criteria		Achieved Yes/No	Comments
Pass	Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.		
Pass	Understanding of why customer issues and complex situations sometimes need referral or escalation for specialist attention within their organisation.		

Sample Questions: Pass Criteria		
(K) Understand commercial factors and authority limits for delivering the required customer experience		
Describe the commercial factors required for delivering customer service.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Tell me your limits of authority for delivering the required customer service.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
(K) Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention		
Can you give me reasons why customer issues / complex situations may need to be escalated?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Describe an example of how you escalated a customer issue / complex situation.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Knowing your customers and their needs / Customer Insight			
Grading criteria		Achieved Yes/No	Comments
Pass	Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations.		
Pass	Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.		
Distinction	Demonstrates how they evaluate and review improvements made to their own customer service to ensure a future-focused approach.		

Sample Questions: Pass Criteria		
(K) Know your internal and external customers and how their behaviour may require different approaches from you		
Tell me who your internal and external customers are and how their behaviour may impact how you work with them.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Explain how internal and external customer behaviours may require different approaches from you.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
(K) Understand what drives loyalty, retention and satisfaction and how they impact on your organisation		
Describe the factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Can you provide any examples on how customer loyalty and satisfaction has impacted your organisation?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Sample Questions: Distinction Criteria		
(K) Understand what drives loyalty, retention and satisfaction and how they impact on your organisation		
How can evaluating and reviewing improvements made to customer service ensure a future-focused approach?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
What are the benefits to the organisation of evaluating and reviewing improvements made to customer service?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Customer service culture and environment awareness			
Grading criteria		Achieved Yes/No	Comments
Pass	Evidences knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development.		

Sample Questions: Pass Criteria			
(K) Understand how to find and use industry best practice to enhance own knowledge			
Tell me how you would use industry best practice to enhance own knowledge and where you would find this information?	Yes	<input type="checkbox"/>	No <input type="checkbox"/>

Theme: Business focused service delivery			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.		

Sample Questions: Pass Criteria		
(S) Resolve complex issues by being able to choose from and successfully apply a wide range of approaches		
Explain why you use a particular approach to resolving a complex issue.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Can you provide an example of complex issue you have resolved and the approach you took?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Providing a positive customer experience			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrates when they have balanced the meeting of their customer and their organisation's needs while showing they have considered cost implications.		

Sample Questions: Pass Criteria		
(S) Demonstrate a cost-conscious mind-set when meeting customer and the business needs		
Describe a cost-conscious mind-set when meeting the customer and business needs.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Tell me how you would consider cost implications whilst still meeting the needs of your business and customer?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Develop self		
Grading criteria	Achieved Yes/No	Comments
<p>Pass</p> <p>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.</p>		

Sample Questions: Pass Criteria		
(B) Proactively keep your service, industry and best practice knowledge and skills up-to-date		
Describe how you achieve your development goals and keep your service, industry and best practice knowledge and skills up to date.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
(B) Consider personal goals related to service and take action towards achieving them		
Can you provide an example of a personal goal you are working to achieve in customer service, and outline your plan for achieving it?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Ownership / responsibility			
Grading criteria		Achieved Yes/No	Comments
Pass	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.		

Sample Questions: Pass Criteria		
(B) Make realistic promises and deliver on them		
Describe how you have achieved the learning and development goals outlined in your personal development plan, specifically in relation to your knowledge and skills in customer service.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Explain how you ensure you deliver on any promises you have made to customers.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Theme: Team working			
Grading criteria		Achieved Yes/No	Comments
Pass	Demonstrate sharing own knowledge and experience with others, to support colleague development.		

Sample Questions: Pass Criteria		
(B) Share knowledge and experience with others to support colleague development		
Describe how you can support colleagues with their development by sharing your own knowledge and experience with them.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
How do you use your expertise to support colleagues with their own development?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Document History

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