

apprenticeship FRAMEWORK

Customer Service (Wales)

IMPORTANT NOTIFICATION FOR ALL APPRENTICESHIP STARTS FROM 14 OCTOBER 2016

Modifications to SASW came into effect on 14 October 2016. These changes relate to the Essential Skills and Employer Rights and Responsibilities requirements of a framework and they **ONLY** apply to new Apprenticeship starts on, or after, 14th October. Apprenticeship starts before this date must continue to meet the 2013 SASW requirements for Essential Skills and Employer Rights and Responsibilities.

For more details of the changes and how they will affect new apprenticeship starts, please read the following preface page to the framework document. NB: Please check the "Revising a Framework" section for information on any additional changes that may have been made to this framework.

Latest framework version?

For any previous versions of this framework: www.acwcerts.co.uk/framework_library

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Apprenticeship Certification
Wales

<https://acwcerts.co.uk/web/>

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Customer Service (Wales)

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Framework information

Information on the Issuing Authority for this framework:

Instructus

The Apprenticeship sector for occupations in air conditioning, building services engineering, business and administration, cleaning, customer service, digital/information technology, electro technical, electrical and electronic servicing, enterprise and business support, facilities management, heating and ventilating, housing, human resources and recruitment, industrial relations, leadership and management, marketing and sales (also includes contact centres and third sector), plumbing, property and refrigeration.

Issue number: 3	This framework includes:
Framework ID: FR04302	Level 2 <input checked="" type="checkbox"/> Level 3 <input checked="" type="checkbox"/> Level 4-7 <input type="checkbox"/>
Date this framework is to be reviewed by: 31/07/2023	This framework is for use in: Wales

Short description

The Customer Service Apprenticeship and Foundation Apprenticeship in Wales respond to the employer need for high levels of customer service skills within a wide range of organisations. Customer service skills are transferable across sectors and can be applied to many job roles. The Apprenticeships are primarily aimed at individuals whose job role is dedicated to customer service as an occupation, for example Foundation Apprentices may be Customer Service Trainees, Assistants and Representatives/Agents, whilst Apprentices may be Customer Relationship Managers, Co-ordinators and Team Leaders.

Many employers also select the Customer Service Apprenticeships to complement an individual's technical skills, for example Foundation Apprentices may also be Estate Agents, Nursery Nurses or Florists, etc; whilst Apprentices may be Care Assistants, Dispensing Assistants, Dental Nurses or Cinema Operatives, etc.

Roles in this framework are likely to fit into Standard Occupational Code (SOC): 72

Contact information

Proposer of this framework

[This apprenticeship has been developed by Instructus Skills in partnership with the recruitment industry itself. We have consulted with a wide range of in-house and external recruitment professionals throughout the development of the apprenticeship and its qualifications, through expert panels, working groups and online consultations.

The apprenticeship has been developed with the support and help of the Recruitment Employment Confederation (REC). The REC and the Institute of Recruiters (IOR), have provided the expertise and contact with the recruitment industry used to develop the apprenticeship, ensuring its content reflects the needs of the recruitment industry.]

Developer of this framework

Name: [Tony Beecher]

Organisation: [Instructus Skills]

Organisation Type: [Standard Setting Body]

Job Title: [Standards and Portfolio Manager]

Phone: [01536 738 631]

Email: [skills@instructus.org]

Postal address: [Unit 3 Cherry Hall Road
North Kettering Business Park
Kettering
NN14 1UE]

Website: [<https://www.instructus-skills.org>]

Issuing Authority's contact details

Issued by: [Instructus]

Issuer contact name: [Damian Brown]

Issuer contact phone: [01536 739385]

Issuer Email: [skills@instructus.org]

Contact Details

Who is making this revision | Larisa Puk

Your organisation | Instructus Skills

Your email address: | skills@instructus.org

Revising a framework

Why this framework is being revised

| This framework has been updated by Instructus Skills in order to amend contact details, and ensure all qualifications are up to date.

Summary of changes made to this framework

| This framework has been updated by Instructus Skills in order to amend contact details, and ensure all qualifications are up to date.

Qualifications removed

| Level 2 Diploma in Customer Service - 601/4797/0 - YMCA Qualifications

Level 2 Diploma in Customer Service - 601/4213/3 - SQA

Level 2 Diploma in Customer Service - 601/4357/5 - VTCT (ITEC)

Level 3 Diploma in Customer Service - 601/4214/5 - SQA

Level 3 Diploma in Customer Service - 601/4392/7 - VTCT (ITEC)

Qualifications added

| Level 2 Diploma in Customer Service - C00/1231/8 - Agored Cymru

Level 3 Diploma in Customer Service - C00/1231/9 - Agored Cymru

Qualifications that have been extended

| N/A

Purpose of this framework

Summary of the purpose of the framework

Employers recognise the key role customer-facing staff play in determining the quality of the customer experience and in increasing customer loyalty. In an increasingly service-led economy, customer demand for better and more individualised service is set to continue to increase. Therefore, there is a need to raise customer service standards and increase the supply of people with customer service skills. Employers across all sectors, regardless of whether their main business is customer service or if they wish to train staff to undertake customer service as part of their job role, need to up skill their current workforce and recruit new staff. Customer Service Apprenticeships have a major role to play in this by helping employers address the skills gaps and shortages that they are experiencing, and by providing a vehicle for introducing and raising customer service skills in the workplace.

The existing workforce needs to be up skilled and new people attracted into customer service job roles. As competition grows and social networking is increasing, customer expectations are continuously rising. To meet these challenge employers must find new and innovative ways of providing customer confidence. This can be achieved by ensuring that high levels of customer service skills are practiced by management and employees throughout their organisation and by ensuring that policies and practices of the organisation reflect best practice in customer service.

In Wales there are 117,800 people working in Sales and Customer Service related occupations (Statistics for Wales, September 2016), which represents 8.3% of the Welsh workforce. Employers have been using Apprenticeships in Customer Service since the mid-1990s as a recruitment tool. According to Statistics for Wales (www.statswales.gov.wales), during the 2014-2015 academic year (1st August – 31st July), 2205 Apprenticeship programmes in Wales were in Customer Service, making it one of the most popular Apprenticeship programmes in Wales.

Customer demands are now driving the new service led economy through changes in new technology and the rise of social media and networking.

These changes are now underpinning the drive for efficiency in response to:

- increased emphasis on high level customer service skills
- recruiting, up-skilling and retaining staff who are competent and motivated to support their customers
- raising product and service quality
- delivering high speed and effective responses
- changes in production methods and the management of human resources

- elasticity of demand for different products and services
- changes in tastes and preferences
- changes to the patterns of demand
- emphasis on high value added
- higher quality, high specification goods and services
- UK wide and global competition.

Due to the varied nature of the Customer Service industry there are many job roles that apply to Customer Service Level 2 apprentices. These will include job roles which are dedicated to customer service such as Customer Service Trainee, Customer Service Assistant, Customer Service Advisor, Customer Service Representative, Customer Service Agent, Customer Service Administrator, Customer Service Officer, Customer Service Liaison Officer, Customer Liaison Assistant, Customer Liaison Executive and Customer Service Clerk. Job roles within which Customer Service skills complement other technical skills at the Intermediate level will include Accounts Payable Clerk, Bakery Assistant, Export Clerk, Trainee Sport Coach, Warehouse Assistant, Cashier and Trainee Optician, as examples.

At Level 3, dedicated customer service job roles will include Customer Relations Officer, Customer Relationship Manager, Customer Support Agent, Customer Service Executive Officer, Customer Support Officer, Customer Service Delivery Co-ordinator, Customer Service Operator, Customer Service Team Leader, Customer Service Supervisor, Customer Service Co-ordinator, Customer Service Manager and Senior Customer Service Advisor as well as complementary job roles such as Paint Body Advisor, Nurse, Nail Technician, Lifeguard, Account Manager, Restaurant Supervisor and Recruitment Consultant.

The Customer Service Apprenticeships have been built on the success of their predecessors by including employer led, up to date, flexible qualifications which meet their demand for higher levels of customer service skills, including softer-skills such as communication, team working, interpersonal skills and the ability to improve own learning and performance.

Essential Communication Skills and Essential Application of Number Skills are included in the Customer Service Apprenticeship options offered for Essential Skills Wales. However, there are no Essential Digital Literacy Skills in these Apprenticeships as digital literacy skills may not be relevant for all Customer Service job roles and may therefore be difficult for all apprentices to complete. Due to the pan sector nature of Customer Service, and the diversity found in apprentice job roles outlined above, an introduction of IT to these frameworks would prohibit a considerable number of learners from attaining this Apprenticeship.

Whatever job role or sector a Customer Service apprentice might work in, they will be learning and understanding the key concepts of customer service and how to apply customer service knowledge and skills in the workplace.

For a Level 2 apprentice these skills could involve communicating with customers, building relationships with customers, resolving problems, promoting products and/or services, using

appropriate communication channels, keeping records, gathering customer feedback and working in a team.

For a Level 3 apprentice these skills could involve improving customer satisfaction, team leading, improving customer loyalty, gathering and analysing customer feedback, processing complaints and maintaining reliable customer service.

The framework will also contribute to meeting the skills priorities in Wales by:

- providing flexible access to a high quality Level 2 and 3 skills programme, which ever entry route apprentices use for those who prefer this style of learning and achievement
- incorporating skills to improve the levels of general literacy and numeracy in Wales
- using technical and competence qualifications, valued by employers, to help their businesses grow
- developing apprentice's employability skills making them more attractive to employers whichever career they choose
- providing a career pathway into jobs and training at technician level and higher, to provide the skills which the economy needs to grow
- building on the existing quality learning provision for Customer Service in Wales.

Aims and objectives of this framework (Wales)

(No requirement specified)

Entry conditions for this framework

There are no mandatory entry requirements for this apprenticeship framework. However, employers are looking to attract applicants who have a keen interest in providing excellent customer service and working as part of a team. They expect applicants to demonstrate a "can do" attitude and have basic numeracy and literacy skills on which to build their customer service skills.

Entrants will come from diverse backgrounds and will come with a range of experience, age, personal achievements and, in some cases, prior qualifications and awards which may count towards the achievement of an Apprenticeship programme. The examples below, which are in no particular order of preference, include having:

- held a position of responsibility at school or college; or
- undertaken work experience or work placement experience; or
- completed the Duke of Edinburgh Award or similar award; or
- achieved the Welsh Bacalaureate, including the Principal Learning Qualifications of Business, Administration and Finance, Retail Business or Hospitality; or
- achieved GCSEs or A levels; or
- achieved QCF/RQF Awards, Certificates or Diplomas

Apprentices who are undertaking the Customer Service Level 3 Apprenticeship are likely to have some prior experience in a customer service role, although this is not a formal requirement.

Rules to avoid repeating qualifications

Processes exist to make sure that applicants with prior knowledge, qualifications and experience are not disadvantaged by having to repeat learning. Training providers and awarding organisations will be able to advise on the current rules for accrediting prior learning and recognising prior experience.

1. Essential Skills Wales (ESW)

Foundation apprenticeships (Level 2):

Where Essential Skills qualifications are specified in a foundation apprenticeship framework (Level 2), the apprenticeship framework must specify as a Welsh certificate requirement, the acceptance of one of the following recognised proxy qualifications.

For Communication:

- GCSE or iGCSE qualification in English language or literature to at least grade G (Level 1 equivalent); or

- O Level qualification in English language or literature to at least grade E; or
- A/AS Level qualification in English language or literature to at least grade E; or
- SCQF Level 4 – Communication Core Skills (Oral communication and written communication); or
- SQA National 4 English; or
- Functional Skills or Key Skills literacy qualifications in English provided the proxy qualification(s) attained are at Level 1 or above.

For Application of Number:

- GCSE or iGCSE qualification in Mathematics to at least grade G (Level 1 equivalent); or
- O Level qualification in Mathematics to at least grade E; or
- A/AS Level qualification in Mathematics to at least grade E; or
- SCQF Level 4 – Numeracy Core Skill (Graphical Information and using number); or
- SQA National 4 Mathematics ; or
- Functional Skills or Key Skills numeracy qualifications in Mathematics provided the proxy qualification(s) attained are at Level 1 or above.

Apprenticeships (Level 3):

Where Essential Skills qualifications are specified in an apprenticeship framework (Level 3), the apprenticeship framework must specify as a Welsh certificate requirement, the acceptance of one of the following recognised proxy qualifications.

For Communication:

- GCSE or iGCSE qualification in English language or literature to at least grade C (Level 2 equivalent); or
- O Level Qualification in English language or literature to at least grade C; or
- A/AS Level qualification in English or literature to at least grade E; or
- SCQF Level 5 – Communication Core Skills (Oral communication and written communication); or
- SQA National 5 English; or
- Functional Skills or Key Skills literacy qualifications in English provided the proxy qualification(s) attained is at Level 2 or above.

For Application of Number:

- GCSE or iGCSE qualification in Mathematics to at least grade C (Level 2 equivalent); or
- O Level Qualification in Mathematics to at least grade C; or
- A/AS Level qualification in Mathematics to at least grade E; or
- SCQF Level 5 – Numeracy Core Skill (Graphical information and using number); or
- SQA National 5 Mathematics; or
- Functional Skills or Key Skills numeracy qualifications in Mathematics provided the proxy qualification(s) attained are at Level 2 or above.

2. Qualifications

- If applicants have previously completed units that are within one of the combined qualifications, it is possible that this can count towards the total credits of the framework. It is necessary for your Awarding Body to verify all occurrences of the recognition of prior learning.

3. Prior experience

- Applicants already working in the sector are able to have their prior experience recognised by the Awarding Organisation and this will count towards the competence and the knowledge qualifications in this framework.

Initial Assessment

Training providers and employers will use initial assessment to ensure that applicants have a fair opportunity to demonstrate their ability and to tailor programmes to meet individual needs, recognising prior qualifications and experience.

Level 2

Title for this framework at level 2

Foundation Apprenticeship in Customer Service

Pathways for the framework at level 2:

Pathway 1: Customer Service

Level 2, Pathway 1: Customer Service

Description of this pathway

Customer Service - Minimum of **57** credits

This Includes a minimum of:

- Combined qualification - 45 credits;
- Essential Skills Communication and Application of Numbers - 12 credits

Entry requirements for this pathway in addition to the framework entry requirements

There are no entry requirements for this pathway in addition to the general framework entry requirements.

Job title(s)	Job role(s)
Customer Service Trainee, Assistant, Representative or Agent	Communicating effectively with customers face to face, in writing, or by telephone, resolving problems and improving customer relations, promoting products and services, keeping records, gathering customer feedback, working in a team, developing complementary technical skills according to job role.

Qualifications

Competence qualifications available to this pathway

N/A

Knowledge qualifications available to this pathway

N/A

Combined qualifications available to this pathway

B1 – Level 2 Diploma in Customer Service

No.	Ref no.	Awarding organisation	Credit value	Guided learning hours	UCAS points value
B1a	601/3544/X	Active IQ	45	245-305	450
B1b	601/3734/4	BIIAB	45	245-305	450
B1c	601/3562/1	City and Guilds of London Institute	45	245-305	450
B1d	601/3852/X	Future (Awards and Qualifications) Ltd	45	245-305	450
B1e	601/4026/4	Highfield Qualifications	45	245-305	450
B1f	601/3689/3	iCQ	45	245-305	450
B1g	601/3456/2	IMI Awards Ltd	45	245-305	450
B1h	601/3618/2	Industry Qualifications	45	245-305	450
B1i	601/3511/6	Lifetime Awarding	45	245-305	450
B1j	601/3973/0	NCFE	45	245-305	450
B1k	601/3432/X	OCR	45	245-305	450
B1l	601/3424/0	Pearson	45	245-305	450
B1m	601/3576/1	ProQual	45	245-305	450
B1n	601/3520/7	Skillsfirst Awards Ltd	45	245-305	450

B1p	601/4310/1	SFJ Awards	45	245-305	450
B1q	601/4405/1	Open College Network London Region	45	245-305	450
B1r	601/4418/X	NOCN	45	245-305	450
B1t	601/4882/2	VTCT	45	245-305	450
B1u	C00/1231/8	Agored Cymru	45	275	450

Relationship between competence and knowledge qualifications

The Level 2 Diploma in Customer Service includes both knowledge and competence units.

A minimum total of 45 credits must be achieved to gain the qualification as follows:

All 19 credits must be achieved from the mandatory Group M. A minimum of 3 credits must be achieved from optional Group A. A minimum of 16 credits must be achieved from optional Group B. No more than 7 credits may be achieved from optional Group C.

Mandatory Group M

Competence Units

- Deliver customer service A/506/2130 **Unit Credit Value 5**
- Manage personal performance and development L/506/1788 **Unit Credit Value 4**

Knowledge Units

- Principles of customer service J/506/2132 **Unit Credit Value 4**
- Understand customers F/506/2131 **Unit Credit Value 2**
- Understand employer organisations A/506/1964 **Unit Credit Value 4**

Optional Group A

Competence Units

- Communicate verbally with customers D/506/2119 **Unit Credit Value 3**
- Communicate with customers in writing T/506/2126 **Unit Credit Value 3**

Optional Group B

Competence Units

- Deal with incoming telephone calls from customers H/506/2154 **Unit Credit Value 3**
- Make telephone calls to customers K/506/2155 **Unit Credit Value 3**
- Promote additional products and/or services to customers L/506/2133 **Unit Credit Value 2**
- Process information about customers R/506/2134 **Unit Credit Value 3**
- Exceed customer expectations Y/506/2135 **Unit Credit Value 3**
- Deliver customer service whilst working on customer's premises T/506/2143 **Unit Credit**

Value 4

- Carry out customer service handovers T/506/2157 **Unit Credit Value 3**
- Resolve customer service problems A/506/2158 **Unit Credit Value 5**
- Deliver customer service to challenging customers F/506/2159 **Unit Credit Value 3**
- Develop customer relationships Y/506/2149 **Unit Credit Value 3**
- Support customer service improvements T/506/2160 **Unit Credit Value 3**
- Support customers through real-time online customer service A/506/2161 **Unit Credit Value 3**
- Support customers using self-service equipment H/506/2977 **Unit Credit Value 3**
- Use social media to deliver customer service J/506/2163 **Unit Credit Value 3**
- Provide post transaction customer service K/506/2978 **Unit Credit Value 5**
- Resolve customers' complaints R/506/2151 **Unit Credit Value 4**
- Gather, analyse and interpret customer feedback D/506/2170 **Unit Credit Value 5**

Optional Group C

Competence Units

- Manage diary systems L/506/1807 **Unit Credit Value 2**
- Provide reception services H/506/1814 **Unit Credit Value 3**
- Contribute to the organisation of an event L/506/1869 **Unit Credit Value 3**
- Buddy a colleague to develop their skills M/506/1895 **Unit Credit Value 3**
- Employee rights and responsibilities L/506/1905 **Unit Credit Value 2**
- Carry out direct sales activities in a contact centre L/503/0394 **Unit Credit Value 5**
- Deal with incidents through a contact centre K/503/0421 **Unit Credit Value 7**
- Health and safety procedures in the workplace T/505/4673 **Unit Credit Value 2**
- Bespoke Software F/502/4396 **Unit Credit Value 3**
- Develop working relationships with colleagues R/506/1789 **Unit Credit Value 3**
- Principles of equality and diversity in the workplace J/506/1806 **Unit Credit Value 2**
- Processing sales orders M/502/8587 **Unit Credit Value 2**
- Meeting customers' after sales needs R/502/8601 **Unit Credit Value 3**
- Handling objections and closing sales M/502/8606 **Unit Credit Value 3**

Knowledge Units

- Negotiate in a business environment H/506/1912 **Unit Credit Value 4**

You may need to supply the evidence requirements for Apprenticeship Completion certification if requested to do so by ACW.

Please note: those who have already achieved competence and/or knowledge qualifications

prior to this Apprenticeship must select options which will equip them with new skills and learning. |

Essential Skills

An apprenticeship framework must specify as a Welsh certificate requirement the expected achievement levels of Essential Skills in Communication and the Application of Number, and Digital Literacy (where required).

ESSENTIAL SKILLS WALES

Communication	Min.Level 1
Application of Number	Min.Level 1
IT/Digital Literacy	N/A

For the current list of acceptable proxy qualifications and appropriate minimum grade/level requirements, please refer to the most recent version of SASW on the gov.wales website. Additional guidance materials can be found on the Knowledge Base section of the ACW website.

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Progression routes into and from this pathway

Progression into the Customer Service Foundation Apprenticeship (Level 2)

Progression into this Level 2 Foundation Apprenticeship may be from a wide number of routes due to the varying backgrounds and past academic and work related experiences of apprentices. Such routes will include having:

- achieved QCF/RQF Awards, Certificates or Diplomas
- achieved a Welsh Bacculaureate, including Principal Learning Qualifications in Business, Administration and Finance, Retail Business or Hospitality
- achieved GCSEs or A levels

Learners may also progress into the Foundation Apprenticeship without prior qualifications.

Progression from the Customer Service Foundation Apprenticeship (Level 2)

Upon completion of this pathway, apprentices, with support and opportunities in the workplace, can progress onto:

- the Level 3 Apprenticeship in Customer Service
- other Level 3 Apprenticeships – particularly where customer service is an important part of the job such as Business & Administration, Retail, Hospitality and Travel & Tourism
- the Welsh Bacculaureate
- further education to undertake customer service, business related or other qualifications.

With additional training, Level 2 Foundation apprentices may be able to progress in their careers to roles including customer relationship manager, customer service executive officer, customer service delivery coordinator, customer service team leader, customer service supervisors and managers, senior customer service advisers or a wide range of other Customer Service related roles.

UCAS points for this pathway:

[Framework Developer to complete with relevant info]

Employee rights and responsibilities

Please note that for Apprenticeship starts from 14/10/2016 onwards ERR is no longer a **mandatory** requirement in all frameworks.

However, it may still be included in some frameworks and where it is not explicitly stated that ERR is not a requirement then confirmation of an Apprentice’s ERR achievement will still remain a requirement for Apprenticeship certification purposes.

Is ERR a requirement for this framework? **YES** **NO**

Delivery and assessment

[Framework Developer to complete with relevant info]

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Level 3

Title for this framework at level 3

Apprenticeship in Customer Service

Pathways for the framework at level 3:

Pathway 1: Customer Service

Level 3, Pathway 1: Customer Service

Description of this pathway

Customer Service - Minimum of **67** credits

This Includes a minimum of:

- Combined qualification - 55 credits
- Essential Skills Communication and Application of Numbers - 12 credits

Entry requirements for this pathway in addition to the framework entry requirements

There are no entry requirements for this pathway in addition to the general framework entry requirements.

However, it is likely that Apprentices will have some prior experience in a customer service role to allow them to complete the Apprenticeship, although this is not a formal requirement.

Job title(s)	Job role(s)
Customer Relationship Manager, Co-ordinator, Customer Service Team Leader	Communicating effectively with customers face to face, in writing, or by telephone, resolving problems and improving customer relations, promoting products and services, using software/office equipment to communicate, keeping records, gathering and analysing customer feedback and leading a team.

Qualifications

Competence qualifications available to this pathway

N/A

Knowledge qualifications available to this pathway

N/A

Combined qualifications available to this pathway

B1 – Level 3 Diploma in Customer Service

No.	Ref no.	Awarding organisation	Credit value	Guided learning hours	UCAS points value
B1a	601/3545/1	Active IQ	55	289-375	550
B1b	601/3735/6	BIIAB	55	289-375	550
B1c	601/3564/5	City and Guilds of London Institute	55	289-375	550
B1d	601/3873/7	Future (Awards and Qualifications) Ltd	55	289-375	550
B1e	601/4027/6	Highfield Qualifications	55	289-375	550
B1f	601/3687/X	iCQ	55	289-375	550
B1g	601/3457/4	IMI Awarding	55	289-375	545
B1h	601/3512/8	Innovate Awarding	55	289-375	550
B1i	601/3974/2	NCFE	55	289-375	550
B1j	601/3433/1	OCR	55	289-375	550
B1k	601/3478/1	Pearson	55	289-375	550
B1l	601/3577/3	ProQual	55	289-375	550
B1m	601/3521/9	Skillsfirst Awards	55	289-375	550
B1p	601/4419/1	NOCN	55	289-375	550

B1q	601/4883/4	VTCT	55	389-375	550
B1r	C00/1231/9	Agored Cymru	55	332	550

Relationship between competence and knowledge qualifications

The Level 3 Diploma in Customer Service includes both knowledge and competence units.

A minimum total of 55 credits must be achieved to gain the qualification as follows:

All 31 credits must be achieved from the mandatory Group M. A minimum of 15 credits must be achieved from optional Group A. A maximum of 9 credits can only be achieved from optional Group B.

Mandatory Group M

Competence units

- Manage personal and professional development T/506/2952 **Unit Credit Value 3**
- Organise and deliver customer service L/506/2150 **Unit Credit Value 5**
- Resolve customers' problems K/506/2169 **Unit Credit Value 4**

Knowledge units

- Principles of business D/506/1942 **Unit Credit Value 10**
- Understand customers and customer retention J/506/2910 **Unit Credit Value 4**
- Understand the customer service environment Y/506/2152 **Unit Credit Value 5**

Optional Group A

- Communicate verbally with customers D/506/2119 **Unit Credit Value 3**
- Communicate with customers in writing T/506/2126 **Unit Credit Value 3**
- Promote additional products and/or services to customers L/506/2133 **Unit Credit Value 2**
- Exceed customer expectations Y/506/2135 **Unit Credit Value 3**
- Deliver customer service whilst working on customer's premises T/506/2143 **Unit Credit Value 4**
- Deliver customer service to challenging customers F/506/2159 **Unit Credit Value 3**
- Develop customer relationships Y/506/2149 **Unit Credit Value 3**
- Support customer service improvements T/506/2160 **Unit Credit Value 3**
- Support customers through real-time online customer service A/506/2161 **Unit Credit Value 3**
- Support customers using self-service equipment H/506/2977 **Unit Credit Value 3**
- Use social media to deliver customer service J/506/2163 **Unit Credit Value 3**

- Provide post transaction customer service K/506/2978 **Unit Credit Value 5**
- Develop resources to support consistency of customer service delivery Y/506/2166 **Unit Credit Value 5**
- Use service partnerships to deliver customer service D/506/2167 **Unit Credit Value 3**
- Resolve customers' complaints R/506/2151 **Unit Credit Value 4**
- Gather, analyse and interpret customer feedback D/506/2170 **Unit Credit Value 5**
- Monitor the quality of customer service interactions K/506/2172 **Unit Credit Value 5**
- Champion customer service D/506/2153 **Unit Credit Value 4**
- Build and maintain effective customer relations R/506/2179 **Unit Credit Value 6**
- Manage a customer service award programmes L/506/2181 **Unit Credit Value 4**
- Manage the use of technology to improve customer service Y/506/2183 **Unit Credit Value 4**
- Develop a social media strategy for customer service D/506/2962 **Unit Credit Value 5**

Optional Group B

- Manage diary systems L/506/1807 **Unit Credit Value 2**
- Provide reception services H/506/1814 **Unit Credit Value 3**
- Contribute to the organisation of an event L/506/1869 **Unit Credit Value 3**
- Buddy a colleague to develop their skills M/506/1895 **Unit Credit Value 3**
- Employee rights and responsibilities L/506/1905 **Unit Credit Value 2**
- Negotiate in a business environment H/506/1912 **Unit Credit Value 4**
- Lead direct sales activities in a contact centre team D/503/0397 **Unit Credit Value 4**
- Manage incidents referred to a contact centre K/503/0418 **Unit Credit Value 6**
- Bespoke Software J/502/4397 **Unit Credit Value 4**
- Promote equality, diversity and inclusion in the workplace T/506/1820 **Unit Credit Value 3**
- Manage team performance A/506/1821 **Unit Credit Value 4**
- Manage individuals' performance J/506/1921 **Unit Credit Value 4**
- Collaborate with other departments M/506/1931 **Unit Credit Value 3**
- Processing sales orders M/502/8587 **Unit Credit Value 2**
- Negotiating, handling objections and closing sales F/502/8612 **Unit Credit Value 4**
- Obtaining and analysing sales related information R/502/8615 **Unit Credit Value 4**
- Buyer behaviour in sales situations K/502/8622 **Unit Credit Value 3**

You may need to supply the evidence requirements for Apprenticeship Completion certification if requested to do so by ACW.

Please note: those who have already achieved competence and/or knowledge qualifications prior to this Apprenticeship must select options which will equip them with new skills and learning.

Essential Skills

An apprenticeship framework must specify as a Welsh certificate requirement the expected achievement levels of Essential Skills in Communication and the Application of Number, and Digital Literacy (where required).

ESSENTIAL SKILLS WALES

Communication	Min.Level 2
Application of Number	Min.Level 2
IT/Digital Literacy	N/A

For the current list of acceptable proxy qualifications and appropriate minimum grade/level requirements, please refer to the most recent version of SASW on the gov.wales website. Additional guidance materials can be found on the Knowledge Base section of the ACW website.

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Progression routes into and from this pathway

Progression into the Customer Service Apprenticeship (Level 3)

Progression into this Apprenticeship may be from a wide number of routes due to the varying backgrounds and past academic and work related experiences of apprentices. Such routes will include having:

- achieved a Level 2 Foundation Apprenticeship in Customer Service
- achieved other Foundation Apprenticeships such as Business & Administration, Retail, Hospitality, Travel and Tourism
- achieved QCF/RQF Awards, Certificates or Diplomas
- achieved a Welsh Bacculaureate including Principal Learning Qualifications in Business Administration and Finance, Hospitality or Retail Business
- achieved GCSEs or A levels.

Learners may also progress into the Apprenticeship without prior qualifications.

Most learners progressing into the Customer Service Level 3 Apprenticeship have some prior experience in a customer service job role, although this is not a formal requirement. Learners who do not have any prior experience in a customer service job role may be better suited to the Customer Service Foundation Apprenticeship at Level 2, although all individuals should be judged on their own merits, experiences and capabilities.

Progression from the Customer Service Apprenticeship (Level 3)

Apprentices, with support and opportunities in the workplace, can progress onto:

- a Higher Level Apprenticeship programme such as Business & Professional Administration or Leadership & Management
- further or higher education to undertake customer service, business related or other qualifications, including Foundation Degrees in, for example, Contact Centres, Retail Management, Business Management or Hospitality
- a range of Customer Service, Contact Centres, Sales, Business related and other undergraduate programmes
- a range of Customer Service and other Professional Qualifications, including a Level 4 Diploma in Customer Service Management, a Level 4 Diploma in Contact Centres, a Foundation Degree in Contact Centre Management.

... Customer Service (Wales)
..... level 3
..... Pathway 1

With additional training, Level 3 apprentices may be able to progress in their careers to roles including senior customer service supervisor, customer service manager, and a range of other senior customer service related roles.

UCAS points for this pathway:

N/A

Employee rights and responsibilities

Please note that for Apprenticeship starts from 14/10/2016 onwards ERR is no longer a **mandatory** requirement in all frameworks.

However, it may still be included in some frameworks and where it is not explicitly stated that ERR is not a requirement then confirmation of an Apprentice's ERR achievement will still remain a requirement for Apprenticeship certification purposes.

Is ERR a requirement for this framework? **YES** **NO**

Delivery and assessment

Framework Developer to complete with relevant info

The remaining sections apply to all levels and pathways within this framework.

How equality and diversity will be met

According to national statistics (August 2016 data), males represent just over a third (38%) of employees working in customer service in the UK. Those working in customer service occupations are mainly female (62%). Only 34 per cent of males have part time jobs in customer service whereas 60 per cent of females working in the UK have part time jobs. Although males are under-represented in customer service occupations they are much more likely to have full time positions.

Possible reasons for the imbalance between males and females in the sector include:

- the perception of customer service as a female orientated sector/job-role
- the role part-time staff play in the sector and the relatively high proportion of part-time jobs held by females within the sector
- the perceptions of customer service as not providing high level skills or not leading to professional status
- a perceived lack of a clear, progressive, skill pathway
- a lack of understanding that the generic nature of customer service skills can provide career routes into a wide range of sectors.

As the workforce and the customer base become more diverse, customer service needs to reflect that diversity and manage it effectively. This requires not only sensitivity to issues such as ethnicity, culture, gender and disability, but an awareness of the potential for different and more creative approaches that diversity in general brings to the business.

Apprenticeships are seen as a vital route to encourage and facilitate a diverse set of individuals entering into customer service. Entry conditions to this framework do not discriminate against any individuals, with the framework being open and accessible to all potential apprentices. Mentoring is also promoted within the Apprenticeship to provide additional support and increase the chances of apprentices staying. Training providers and employers must also comply with the Equality Act 2010 to ensure that applicants are not discriminated against in terms of entry to and promotion within, the industry, using the protected characteristics of:

- Age
- Disability
- Gender reassignment
- Marriage and civil partnership
- Race
- Religion or Belief
- Sex
- Sexual orientation

In order to address some of these issues, awareness of customer service as a profession is being raised through:

- the Welsh Baccalaureate and the Principal Learning Qualifications in Business, Administration and Finance, Retail Business and Hospitality, as all these qualifications have underpinning customer service and equality and diversity themes
- teaching resources for schools
- opportunities to engage with ethnic groups and improve occupational opportunities various careers websites for the customer service Industry, which include non-stereotypical images

Instructus Skills will monitor take-up and achievement of all apprenticeships and take steps to address any barriers to take-up and achievement. |

On and off the job training

Summary of on- and off-the-job training

Training time for the Customer Service Apprenticeship programmes is split into on the job training hours and off the job training hours, as described below.

Total on the job and off the job training hours are as follows:

- Level 2 Customer Service - 413 hours
- Level 3 Customer Service - 481 hours

The apprenticeship will last a minimum of 12 months. A flexible approach to learning is encouraged for learners who have prior learning or experience.

Regardless of how long the apprenticeship takes, the minimum number of training hours, as shown above, must be met.

Training hours can be attached to both the accredited and un-accredited parts of the apprenticeship, and will include, for example, inductions, reviews, training, the qualification, career discussions, Essential Skills Wales and any other activities which help the apprentice gather the required skills and underpinning knowledge need within their job role.

It is recommended that a training plan is developed at the outset of the apprenticeship to determine how the training hours requirements will be met.

Off-the-job training

Level 2 Customer Service Foundation Apprenticeship

The total off-the-job training for the Customer Service Foundation Apprenticeship is **130 hours**, made up as follows:

- 40 hours for Essential Skills Wales (20 hours per Skill)
- 56 hours (minimum) associated with the competence and knowledge element of the combined qualification
- 24 hours of off-the-job coaching and mentoring to support the apprentice

Level 3 Customer Service Apprenticeship

The total off-the-job training for the Customer Service Apprenticeship is **185 hours**, made up as follows:

- 40 hours for Essential Skills Wales (20 hours per Skill)
- 109 hours (minimum) associated with the competence and knowledge element of the combined qualification
- 36 hours of off-the-job coaching and mentoring to support the apprentice

How this requirement will be met

Training hours delivered under an Apprenticeship agreement may vary depending on the previous experience and attainment of the apprentice.

The amount of off-the-job training required to complete the Apprenticeship under the Apprenticeship agreement may then be reduced accordingly, provided the total number of off-the-job hours for this framework can be verified for Apprenticeship certification.

Previous attainment

Where a learner enters an Apprenticeship agreement having previously attained parts or all of the relevant qualifications, this prior learning needs to be recognised using either RQF credit transfer for achievements within the RQF; or through certificated learning outside of the RQF, for example Principal Learning qualifications.

For apprentices who have already achieved the relevant qualifications, they must have been certificated within five years of applying for the Apprenticeship Certificate.

Previous experience

Where a learner enters an Apprenticeship agreement with previous work-related experience, this prior learning needs to be recognised. To count towards Apprenticeship certification, previous experience must be recorded using the appropriate Awarding Organisation's CQFW 'Recognition of Prior Learning' (RPL) procedures and the hours recorded may then count towards the off-the-job hours required to complete the Apprenticeship.

For apprentices with prior uncertificated learning experience, the off-the-job learning must have been acquired within five years of application for the Apprenticeship Certificate or have been continuously employed in the relevant job role in the industry for three years duration.

Off-the-job Guided Learning Hours must:

- be planned, reviewed and evaluated jointly between the apprentice and: a tutor, or teacher; their workplace supervisor or manager; or their coach or mentor;
- allow access as and when required by the apprentice either to a tutor, teacher, supervisor, manager, mentor or coach;
- be delivered through one or more of the following methods: individual and group teaching, e-learning; distance learning; coaching; mentoring; observation, feedback and assessment; collaborative/networked learning with peers, guided study and induction.
- be characterised by formal or planned taught sessions delivered predominantly by qualified training staff;
- be delivered during contracted working hours;
- be delivered whilst working under an apprenticeship agreement, or during a qualifying period prior to working under an apprenticeship agreement ending on the date of application for an apprenticeship certificate.

Off-the-job training must be formally recorded, either in a diary, workbook, portfolio, or be verified by attendance records. This evidence needs to be checked and signed by the assessor and employer.

Evidence of off the job hours

The Apprenticeship Certificate Claim Form must be completed by the learner and employer or training provider, stating that the minimum required levels of on an off the job training, as set out

in the apprenticeship framework document, have been met. Please see the ACW website for the relevant documents and for further information (www.acwcerts.co.uk/web/forms-documentation)

On-the-job training

Level 2 Customer Service Foundation Apprenticeship

The total on-the-job training for the Customer Service Foundation Apprenticeship is **283 hours**, made up as follows:

- 80 hours for Essential Skills Wales (40 hours per Skill)
- 179 hours (minimum) associated with the competence and knowledge element of the combined qualification
- 24 hours of on-the-job coaching and mentoring to support the apprentice

Level 3 Customer Service Apprenticeship

The total on-the-job training for the Customer Service Apprenticeship is **296 hours**, made up as follows:

- 80 hours for Essential Skills Wales (40 hours per Skill)
- 180 hours (minimum) associated with the competence and knowledge element of the combined qualification
- 36 hours of on-the-job coaching and mentoring to support the apprentice

How this requirement will be met

On-the-job training is defined as skills, knowledge and competence gained within normal work duties.

These hours may vary depending on previous experience and attainment of the apprentice. Where a learner enters an apprenticeship agreement having previously attained or acquired the appropriate competencies or knowledge, this prior learning needs to be recognised and documented using the relevant RQF credit transfer, RQF exemption or RPL procedures (as off-the-job above). The amount of on-the-job training required to complete the Apprenticeship under the Apprenticeship agreement may then be reduced accordingly, provided the total number of on-the-job hours for this framework can be verified for apprenticeship certification.

Apprentices who commence training under a new Apprenticeship agreement with a new employer may bring a range of prior experience with them. When an apprentice can claim 25% or more hours towards the on-the-job framework total through prior learning acquired from previous full-time education, employment or other vocational programmes, then the apprentice's learning programme should include 'customisation'.

Training providers are encouraged to identify additional on-the-job training programmes that customise the learning to the new workplace. Customisation programmes may include:

- selecting appropriate additional Unit(s) from RQF qualifications, or relevant units recognised as Quality Assured Lifelong Learning [QALL] through a CQFW recognised body
- following Essential Skills Wales at a level higher than that specified in the framework including one or more Wider Key Skills or other competency-based qualifications/units relevant to the workplace.

For apprentices who have already achieved the relevant qualifications, they must have been certificated within 5 years from the date of application for the Foundation Apprenticeship/Apprenticeship Certificate or have been continuously employed in the industry for three years. Job roles within Customer Service require a thorough level of technical competence and knowledge, which will be undertaken through work-based training, practice and experience.

On-the-job learning must be formally recorded, either in a diary, workbook, portfolio, or be verified by attendance records. This evidence needs to be checked and signed by the learner and assessor.

On-the-job Guided Learning Hours must:

- be planned, reviewed and evaluated jointly between the apprentice and a tutor, or teacher; their workplace supervisor or manager; or their coach or mentor;
- allow access as and when required by the apprentice either to a tutor, teacher, supervisor, manager, mentor or coach;
- be delivered through one or more of the following methods: individual and group teaching, e-learning; distance learning; coaching; mentoring; observation, feedback and assessment; collaborative/networked learning with peers, guided study and induction.
- enable the apprentice to demonstrate practical job-related skills and to practice and apply these in the context of the job. This type of learning will be delivered in the workplace;
- be delivered whilst working under an apprenticeship agreement, or during a qualifying period prior to working under an apprenticeship agreement ending on the date of application for an apprenticeship certificate.

Evidence of on the job training hours

The Apprenticeship Certificate Claim Form must be completed by the learner and employer or training provider, stating that the minimum required levels of on an off the job training, as set out in the apprenticeship framework document, have been met.

Please see the ACW website for the relevant documents and for further information (www.acwcerts.co.uk/web/forms-documentation) |

Wider key skills assessment and recognition

While Wider Key Skills are not a **mandatory** part of the framework, training providers are encouraged to provide apprentices the opportunity to achieve them.

For this framework, there are natural opportunities for Wider Key Skills to be embedded within the mandatory units of the following qualifications:

[Enter Qualification Names]

Improving own learning and performance

[Give examples - signpost to specific units in framework qualifications that would meet these requirements]

Working with others

[Give examples - signpost to specific units in framework qualifications that would meet these requirements]

Problem solving

[Give examples - signpost to specific units in framework qualifications that would meet these requirements]

apprenticeship FRAMEWORK

For more information visit-
www.acwcerts.co.uk/framework_library