

# 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?

Please use this link to see if this is the latest issued version of this framework:

[afo.sscalliance.org/frameworkslibrary/index.cfm?id=FR03150](http://afo.sscalliance.org/frameworkslibrary/index.cfm?id=FR03150)

Issue date: 05 December 2014

Published by  
Skills CFA

apprenticeship  
FRAMEWORKS ONLINE  
[www.afo.sscalliance.org](http://www.afo.sscalliance.org)

# CHANGES TO REQUIREMENTS FOR APPRENTICESHIP STARTS FROM 14TH 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 2016. Apprenticeship starts before this date must continue to meet the 2013 SASW requirements for Essential Skills and Employer Rights and Responsibilities.

## Alternatives for Essential Skill qualifications

**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:

- a. GCSE or iGCSE qualification in English language or literature to at least grade G (Level 1 equivalent); or
- b. O Level qualification in English language or literature to at least grade E; or
- c. A/AS Level qualification in English language or literature to at least grade E; or
- d. SCQF Level 4 – Communication Core Skills (Oral communication and written communication); or
- e. SQA National 4 English; or
- f. 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:

- a. GCSE or iGCSE qualification in Mathematics to at least grade G (Level 1 equivalent); or
- b. O Level qualification in Mathematics to at least grade E; or
- c. A/AS Level qualification in Mathematics to at least grade E; or
- d. SCQF Level 4 – Numeracy Core Skill (Graphical Information and using number); or
- e. SQA National 4 Mathematics ; or
- f. 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:

- a. GCSE or iGCSE qualification in English language or literature to at least grade C (Level 2 equivalent); or
- b. O Level Qualification in English language or literature to at least grade C; or
- c. A/AS Level qualification in English or literature to at least grade E; or
- d. SCQF Level 5 – Communication Core Skills (Oral communication and written communication); or
- e. SQA National 5 English; or
- f. 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:

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

**Higher Apprenticeships (Levels 4-7):** Essential Skills requirements are as for an apprenticeship frameworks at Level 3.

# CHANGES TO REQUIREMENTS FOR APPRENTICESHIP STARTS FROM 14TH OCTOBER 2016

## Employer Rights and Responsibilities (ERR)

The final modification to SASW is to Employer Rights and Responsibilities (ERR) which is no longer compulsory in frameworks. Please refer to the Employer Rights and Responsibilities section within the framework document to confirm specific requirements.

## Additional Information

It should be noted that SASW has also been modified to reflect existing improvements to Essential Skills Wales Qualifications. These improvements to ESW qualifications were signalled by the revised names:

- Essential Skills Wales Communication is now Essential Communication Skills (still 6 credits in size)
- Essential Skills Wales Application of Number Skills is now Essential Application of Number Skills (still 6 credits in size)
- Essential Skills Wales Information Communication Technology Skills is now Essential Digital Literacy Skills (still 6 credits in size)

Whilst there have been some amendments to the content of ESW qualifications, the most significant change has been to the assessment methodology for these qualifications.

From 1 January 2016, all new starts have had to follow the revised Essential Skill qualifications.

The updated version of SASW, and guidance documents, can be accessed here:

<http://gov.wales/topics/educationandskills/skillsandtraining/apprenticeships/providers/?lang=en&dgd>

Over the coming months, the Essential Skills section within AFO will be amended to reflect the SASW modifications and all current frameworks will be updated and reissued to incorporate these changes. In the meantime, if you are in any doubt as to the requirements of any framework then please contact the relevant Issuing Authority.

# Customer Service (Wales)

## Contents

Framework summary .....	5
Framework information .....	6
Contact information .....	7
Revising a framework .....	8
Purpose of the framework .....	10
Entry conditions .....	13
Level 2: Foundation Apprenticeship in Customer Service .....	15
Pathway 1: Customer Service .....	16
Level 3: Apprenticeship in Customer Service .....	27
Pathway 1: Customer Service .....	28
Equality and diversity .....	38
On and off the job training .....	40
Wider key skills .....	45
Additional employer requirements .....	46

# Framework summary

## Customer Service

### Foundation Apprenticeship in Customer Service

#### Pathways for this framework at level 2 include:

##### Pathway 1: Customer Service

**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

**This pathway also contains information on:**

- Employee rights and responsibilities
- Essential skills

## Customer Service

### Apprenticeship in Customer Service

#### Pathways for this framework at level 3 include:

##### Pathway 1: Customer Service

**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

**This pathway also contains information on:**

- Employee rights and responsibilities
- Essential skills

# Framework information

## Information on the Publishing Authority for this framework:

### Skills CFA

The Apprenticeship sector for occupations in business and administration, customer service, enterprise and business support, human resources and recruitment, industrial relations, leadership and management, marketing and sales (also includes contact centres and third sector).

Issue number: 13	<b>This framework includes:</b>
Framework ID: FR03150	Level 2 Level 3
Date this framework is to be reviewed by: 31/07/2017	<b>This framework is for use in: Wales</b>

## 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.

# Contact information

## Proposer of this framework

This framework is published by Skills CFA, the UK standard setting organisation with responsibility for occupations in business and administration, customer service and contact centre operations, enterprise and business support, human resources and recruitment, industrial relations, leadership and management, marketing and sales.

This framework has been developed in consultation with employers, colleges, training providers and awarding organisations and is based on the content of the National Occupational Standards for Customer Service developed by Skills CFA.

## Developer of this framework

Name: Sian Warr  
Organisation: Skills CFA  
Organisation type: Standard Setting Body  
Job title: Project Co-ordinator  
Phone: 020 7091 9620  
Email: [apprenticeships@skillscfa.org](mailto:apprenticeships@skillscfa.org)  
Postal address: Skills CFA  
6 Graphite Square  
Vauxhall Walk  
London  
SE11 5EE  
Website: <http://www.skillscfa.org/>

## Issuing Authority's contact details

Issued by: Skills CFA  
Issuer contact name: Dan Forbes  
Issuer phone: 02070919620  
Issuer email: [apprenticeships@skillscfa.org](mailto:apprenticeships@skillscfa.org)

# Revising a framework

## Contact details

Who is making this revision: Jah-Zena Ryan  
Your organisation: Skills CFA  
Your email address: apprenticeships@skillscfa.org

## Why this framework is being revised

This framework was revised by Skills CFA in December 2014 in order to make additions to the framework, as detailed below.

## Summary of changes made to this framework

This framework was revised by Skills CFA in October 2014 in order to:

- add qualifications into the framework

## Qualifications removed

N/A

## Qualifications added

### Intermediate Level Apprenticeship in Customer Service:

- CYQ Level 2 Diploma in Customer Service (QCF) (601/4797/0)

### Advanced Level Apprenticeship in Customer Service:

- VTCT level 3 Diploma in Customer Service (QCF) (601/4883/4)

## 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.

In Wales there are 99,200 people working in Sales and Customer Service related occupations (Statistics for Wales, June 2010). Employers have estimated that there will be 44,000 new jobs in customer service in Wales between 2007 and 2017 and have been using Apprenticeships in Customer Service since the mid-1990s as a recruitment tool. Every year around 3,500 apprentices start their training in Wales, making it one of the most popular Apprenticeships. The need for high levels of customer service skills is evident across all sectors. In particular the Retail, Financial Services, Contact Centre, Hospitality, Sport and Recreation, Health and Social Care, Telecommunications and Travel and Tourism sectors have the particularly high levels of Customer Service apprentices, with many other sectors, such as Local Government, Motor Vehicle, Power & Energy, Housing and Manufacturing also showing numbers still in their hundreds.

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 and Customer Service Agent. 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 Relationship Manager, Customer Support Officer, Customer Service Team Leader, Customer Service Supervisory and Customer Service Co-ordinator, 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.

Communication and Application of Numbers are included in the Customer Service Apprenticeship options offered for Essential Skills Wales. However, there are no IT Essential Skills Wales in these Apprenticeships as, historically, many learners have not been able to attain these skills due to the constraints of their job roles and access to IT equipment. 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)**

The aim of this Apprenticeship framework is to provide employers in the public, private and not-for-profit sectors with a workforce that has high levels of customer service skills. By

developing the knowledge and competencies required, Customer Service apprentices will be able to contribute to improved customer service delivery and increased customer satisfaction in the public and not-for profit sectors and attract new customers, improve customer loyalty and remain competitive and profitable in the private sector.

The main objectives are to:

- increase the supply of people with high level customer service skills to address the customer service skills gaps and shortages found in organisations of all sizes and across most sectors
- tap into the skills and talents of a diverse population by providing flexible entry routes into a career in Customer Service or to use as a springboard to a career in specific sector
- equip individuals with the skills, knowledge and experience needed to provide excellent customer service in a range of occupations and industries
- provide apprentices with an opportunity to develop the skills, knowledge and experience they will need to progress to roles with additional responsibilities and onto further and higher education, if they wish to do so.

# 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 Bacculaureate, including the Principal Learning Qualifications of Business, Administration and Finance, Retail Business or Hospitality; OR
- achieved GCSEs or A levels; OR
- achieved QCF 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)

- Key skills qualifications are accepted as alternatives to ESW qualifications provided the key skills qualification(s) attained are at the same level(s) as those specified for ESW qualifications.
- ESW qualifications achieved at the level specified in the framework, prior to commencing an apprenticeship can be accepted, provided that the required certificate is presented at the point of certification.
- ESW achieved in the context of the Welsh Bacculaureate Qualification (WBQ) can be accepted, provided the specific certification of the title(s) and level(s) of those ESW qualification is provided. The WBQ certificate itself does not provide this specific evidence.

Where an individual has achieved ESW at level 1 in either Application of Numbers, Communication or ICT or has the relevant key skill prior to starting a level 2 apprenticeship, the employer may allow the individual to study for ESW skills qualifications at level 2 as part of the apprenticeship.

## 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 this 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.



<b>Job title(s)</b>	<b>Job role(s)</b>
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	N/A
B1b	601/3734/4	BIIAB	45	245-305	N/A
B1c	601/3562/1	City and Guilds of London Institute	45	245-305	N/A
B1d	601/3852/X	Future (Awards and Qualifications) Ltd	45	245-305	N/A
B1e	601/4026/4	Highfield Awarding Body for Compliance	45	245-305	N/A
B1f	601/3689/3	iCan Qualifications Limited	45	245-305	N/A
B1g	601/3456/2	IMI Awards Ltd	45	245-305	N/A
B1h	601/3618/2	Industry Qualifications	45	245-305	N/A
B1i	601/3511/6	Lifetime Awarding	45	245-305	N/A
B1j	601/3973/0	NCFE	45	245-304	N/A
B1k	601/3432/X	OCR	45	247-305	N/A
B1l	601/3424/0	Pearson Education Ltd	45	245-305	N/A
B1m	601/3576/1	ProQual Awarding Body	45	245-305	N/A
B1n	601/3520/7	Skillsfirst Awards Ltd	45	245-305	N/A
B1o	601/4213/3	Scottish Qualifications Authority	45	245-305	N/A
B1p	601/4310/1	SJF Awards	45	245-305	N/A
B1q	601/4405/1	Open College Network London Region	45	245-305	N/A
B1r	601/4418/X	NOCN	45	245-305	N/A

B1s	601/4357/5	ITEC	45	245-305	N/A
B1t	601/4882/2	VTCT	45	245-305	N/A
B1u	601/4797/0	Central YMCA Qualifications	45	245-305	N/A

## Relationship between competence and knowledge qualifications

The Level 2 Diploma in Customer Service includes both knowledge and competence units. Learners must complete a minimum of 45 credits. 19 credits from mandatory units, a minimum of 3 credits from Group B optional units, a minimum of 16 credits from Group C optional units and a maximum of 7 credits from Group D optional units.

The requirement for at least 10 credits on the QCF for the knowledge element and 10 credits for the competence element will be completed through the mandatory units. By completing the following mandatory units the apprentice will achieve 9 credits for competence and 10 credits for knowledge. A further 3 credits for the competence element will be achieved by completing one unit from mandatory competence group B.

### Mandatory Group

#### Competence Units

- A/506/2130 - Deliver customer service (5 credits)
- L/506/1788 - Manage personal performance and development (4 credits)

#### Knowledge Units

- J/506/2132 - Principles of customer service (4 credits)
- F/506/2131 - Understand customers (2 credits)
- A/506/1964 - Understand employer performance and development (4 units)

### Group B

#### Competence group

- D/506/2119 - Communicate verbally with customers (3 credits)
- T/506/2126 - Communicate with customers in writing (3 credits)

Group C contains 58 credits from competence units, and Group D contains 43 credits from competence units and 4 credits from knowledge units.

As part of the evidence requirements for Apprenticeship Completion certification, a copy of a completed, current Apprentice Certificate Claim form must be uploaded to ACW

(<http://acwcerts.co.uk>).

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.

# Transferable skills (Wales)

## Essential skills (Wales)

	Minimum level	Credit value
Communication	Level 1	6
Application of numbers	Level 1	6
IT	N/A	N/A

## Progression routes into and from this pathway

### Progression into the Customer Service Foundation Apprenticeship

Progression into this Level 2 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 Awards, Certificates or Diplomas
- achieved a Welsh Baccaulaureate, including Principal Learning Qualifications in Business, Administration and Finance, Retail Business or Hospitality
- achieved GCSEs or A levels

Learners may also progress into the intermediate apprenticeship without prior qualifications.

### Progression from the Customer Service Foundation Apprenticeship

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 Baccaulaureate
- further education to undertake customer service, business related or other qualifications.

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





# Employee rights and responsibilities

## Delivery and assessment of ERR

The Employee Rights and Responsibilities component of the apprenticeship can be achieved through either:

### 1. A QCF ERR Qualification/Unit:

- The L/506/1905 Employee rights and responsibilities unit (QCF) - this is an optional unit included within the combined qualification
- The Level 2 Award in Employee Rights and Responsibilities (QCF) - this qualification is offered by a range of organisations
- Any other approved unit or qualification listed in Skills CFA FAQ

### 2. ERR Workbook

- The Skills CFA ERR workbook, available from the Skills CFA website ([www.skillscfa.org](http://www.skillscfa.org)) - the workbook has been designed to enable apprentices to work their way through a series of questions and activities which will bring the ERR to life, making the learning more meaningful and long lasting and enhance the employability skills of the apprentice.

## ERR National Outcomes

1. knows and understands the range of employer and employee statutory rights and responsibilities under Employment Law. This should cover the apprentice's rights and responsibilities under the Employment Rights Act 1996, Equality Act 2010, and Health and Safety legislation, together with the responsibilities and duties of employers
2. knows and understands the procedures and documentation in their organisation which recognise and protect their relationship with their employer. Health & Safety and Equality & Diversity training must be an integral part of the apprentice's learning programme
3. knows and understands the range of sources of information and advice available to them on their employment rights and responsibilities. Details of Access to Work and Additional Learning Support must be included in the programme
4. understands the role played by their occupation within their organisation and industry
5. has an informed view of the types of career pathways that are open to them
6. knows the types of representative bodies and understands their relevance to their skill, trade or occupation, and their main roles and responsibilities
7. knows where and how to get information and advice on their industry, occupation, training and career
8. can describe and work within their organisation's principles of conduct and codes of practice
9. recognises and can form a view on issues of public concern that affect their organisation and industry.

## **Evidence of achievement of ERR**

As ERR is part of the Apprentice Certificate Claim Form, there is no longer a requirement to evidence ERR completion when applying for apprenticeship certificates. However, we recommend that an internal record of ERR achievement is retained.

## Level 3

Title for this framework at level 3

# Apprenticeship in Customer Service

### Pathways for this 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	N/A
B1b	601/3735/6	BIIAB	55	289-375	N/A
B1c	601/3564/5	City and Guilds of London Institute	55	289-375	N/A
B1d	601/3873/7	Future (Awards and Qualifications) Ltd	55	298-363	N/A
B1e	601/4027/6	Highfield Awarding Body for Compliance	55	289-375	N/A
B1f	601/3687/X	iCan Qualifications Limited	55	289-375	N/A
B1g	601/3457/4	IMI Awards Ltd	55	289-375	N/A
B1h	601/3512/8	Lifetime Awarding	55	289-375	N/A
B1i	601/3974/2	NCFE	55	289-375	N/A
B1j	601/3433/1	OCR	55	289-375	N/A
B1k	601/3478/1	Pearson Education Ltd	55	289-372	N/A
B1l	601/3577/3	Pro Qual Awarding Body	55	289-375	N/A
B1m	601/3521/9	Skillsfirst Awards Ltd	55	289-375	N/A
B1n	601/4214/5	Scottish Qualifications Authority	55	289-375	N/A
B1o	601/4392/7	ITEC	55	289-375	N/A
B1p	601/4419/1	NOCN	55	289-375	N/A
B1q	601/4883/4	VTCT	55	289-375	N/A



## Relationship between competence and knowledge qualifications

The Level 3 Diploma in Customer Service includes both knowledge and competence units. Learners must complete a minimum of 55 credits. 31 credits from mandatory units, a minimum of 15 credits from Group B optional units, a maximum of 9 credits from Group C optional units.

The requirement for at least 10 credits on the QCF for the knowledge element and 10 credits for the competence element will be completed through the mandatory units. By completing the mandatory units the apprentice will achieve 12 credits for competence and 19 credits for knowledge.

The split between knowledge and competence units is shown below:

### **Mandatory Group**

#### *Competence units*

- T/506/2952 - Manage personal and professional development (3 credits)
- L/506/2150 - Organise and deliver customer service (5 credits)
- K/506/2169 - Resolve customers' problems (4 credits)

#### *Knowledge units*

- D/506/1942 - Principles of business (10 credits)
- J/506/2910 - Understand customers and customer retention (4 credits)
- Y/506/2152 - Understand the customer service environment (5 credits)

As part of the evidence requirements for Apprenticeship Completion certification, a copy of a completed, current Apprentice Certificate Claim form must be uploaded to ACW (<http://acwcerts.co.uk>).

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.

# Transferable skills (Wales)

## Essential skills (Wales)

	Minimum level	Credit value
Communication	Level 2	6
Application of numbers	Level 2	6
IT	N/A	N/A

## Progression routes into and from this pathway

### Progression into the Customer Service Apprenticeship

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 Apprenticeship in Customer Service
- achieved other Foundation Apprenticeships including Business & Administration
- achieved QCF Awards, Certificates or Diplomas
- achieved a Welsh BaccaLaureate 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, although all individuals should be judged on their own merits, experiences and capabilities.

### Progression from the Customer Service Apprenticeship

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

- a Higher Level Apprenticeship programme in 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.

With additional training, 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

## Delivery and assessment of ERR

The Employee Rights and Responsibilities component of the apprenticeship can be achieved through either:

### 1. A QCF ERR Qualification/Unit:

- The L/506/1905 Employee rights and responsibilities unit (QCF) - this is an optional unit included within the combined qualification
- The Level 2 Award in Employee Rights and Responsibilities (QCF) - this qualification is offered by a range of organisations
- Any other approved unit or qualification listed in Skills CFA FAQ

### 2. ERR Workbook

- The Skills CFA ERR workbook, available from the Skills CFA website ([www.skillsdfa.org](http://www.skillsdfa.org)) -the workbook has been designed to enable apprentices to work their way through a series of questions and activities which will bring the ERR to life, making the learning more meaningful and long lasting and enhance the employability skills of the apprentice.

## ERR National Outcomes

1. knows and understands the range of employer and employee statutory rights and responsibilities under Employment Law. This should cover the apprentice's rights and responsibilities under the Employment Rights Act 1996, Equality Act 2010, and Health and Safety legislation, together with the responsibilities and duties of employers;
2. knows and understands the procedures and documentation in their organisation which recognise and protect their relationship with their employer. Health & Safety and Equality & Diversity training must be an integral part of the apprentice's learning programme;
3. knows and understands the range of sources of information and advice available to them on their employment rights and responsibilities. Details of Access to Work and Additional Learning Support must be included in the programme;
4. understands the role played by their occupation within their organisation and industry;
5. has an informed view of the types of career pathways that are open to them;
6. knows the types of representative bodies and understands their relevance to their skill, trade or occupation, and their main roles and responsibilities;
7. knows where and how to get information and advice on their industry, occupation, training and career;
8. can describe and work within their organisation's principles of conduct and codes of practice;
9. recognises and can form a view on issues of public concern that affect their organisation and industry.

## **Evidence of achievement of ERR**

As ERR is part of the Apprentice Certificate Claim Form, there is no longer a requirement to evidence ERR completion when applying for apprenticeship certificates. However, we recommend that an internal record of ERR achievement is retained.

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

## How equality and diversity will be met

According to national statistics, males represent less than a third (31%) of employees working in customer service in the UK. Those working in customer service occupations are mainly female (69%) and predominantly White (88%). Only 5 per cent of males have part time jobs in customer service whereas 27 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

Skills CFA 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 (Wales)

## 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)
- 66 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 QCF credit transfer for achievements within the QCF; or through certificated learning outside of the QCF, 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 [see QCF Guidance on Claiming Credit for further details]. 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 Skills CFA website for the relevant documents and for further information ([www.skillsca.org](http://www.skillsca.org))

## **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 QCF credit transfer, QCF 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 QCF qualifications, or relevant units recognised as Quality Assured Lifelong Learning [QALL] through a CQFW recognised body
- following Essential Skills 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 Skills CFA website for the relevant documents and for further information ([www.skillscfa.org](http://www.skillscfa.org))

# Wider key skills assessment and recognition (Wales)

## Improving own learning and performance

The Wider Key Skills are already covered within the core elements of the Apprenticeship qualifications. No additional Wider Key Skills delivery is required.

## Working with others

The Wider Key Skills are already covered within the core elements of the Apprenticeship qualifications. No additional Wider Key Skills delivery is required.

## Problem solving

The Wider Key Skills are already covered within the core elements of the Apprenticeship qualifications. No additional Wider Key Skills delivery is required.

# Additional employer requirements

There are no additional employer requirements.

---

apprenticeship  
FRAMEWORKS ONLINE

For more information visit  
[www.afo.sscalliance.org](http://www.afo.sscalliance.org)