



Customer Service Specialist Level 3 Standard Delivery Plan



Month 1
Business Knowledge and Understanding

Outcome 1: Skills, Knowledge and behaviours

- Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation
- Understand the impact your service provision has on the wider organisation and the value it adds
- Understand your organisation's current business strategy in relation to customers and make recommendations for its future
- Understand the principles and benefits of being able to think about the future when taking action or making service related decisions
- Understand a range of leadership styles and apply them successfully in a customer service environment

Outcome 2: Wider Learning

- Individual Liberty
- Tolerance for those with different faiths and beliefs
- Mutual Respect
- Health & Safety

Month 2
Customer Journey knowledge

Outcome 1: Skills, Knowledge and behaviours

- Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience
- Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention
- Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation
- Understand commercial factors and authority limits for delivering the required customer experience

Outcome 2: Wider Learning

- Safeguarding/Prevent
- Equality and Diversity
- Individual Liberty
- Mutual Respect
- Tolerance for those with different faiths and belief

Month 3
Building Relationships

Outcome 1: Skills, Knowledge and behaviours

- Know your internal and external customers and how their behaviour may require different approaches from you
- Understand how to analyse, use and present a range of information to provide customer insight
- Understand what drives loyalty, retention and satisfaction and how they impact on your organisation
- Understand different customer types and the role of emotions in bringing about a successful outcome
- Understand how customer expectations can differ between cultures, ages and social profiles

Outcome 2: Wider Learning

- Safeguarding/Prevent
- Equality and Diversity
- Individual Liberty
- Mutual Respect
- Tolerance for those with different faiths and belief

Month 4
Customer service culture
and environment awareness

- Outcome 1: Skills, Knowledge and behaviours
- Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers
 - Understand your business environment and culture and the position of customer service within it
 - Understand your organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong
 - Understand how to find and use industry best practice to enhance own knowledge

- Outcome 2: Wider Learning
- Equality and Diversity
 - Safeguarding/Prevent
 - Individual Liberty
 - Tolerance for those with different faiths and beliefs
 - Mutual Respect
 - Democracy

Month 5
Business focused
service delivery

- Outcome 1: Skills, Knowledge and behaviours
- Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice
 - Resolve complex issues by being able to choose from and successfully apply a wide range of approaches
 - Find solutions that meet your organisations needs as well as the customer requirements

- Outcome 2: Wider Learning
- Equality and Diversity
 - Safeguarding/Prevent
 - Individual Liberty
 - Tolerance for those with different faiths and beliefs
 - Mutual Respect
 - Democracy

Month 6
Providing a positive
customer experience

- Outcome 1: Skills, Knowledge and behaviours
- Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes
 - Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy
 - Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps
 - Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction
 - Demonstrate a cost conscious mind-set when meeting customer and the business needs
 - Identifying where highs and lows of the customer journey produce a range of emotions in the customer
 - Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format

- Outcome 2: Wider Learning
- Equality and Diversity
 - Safeguarding/Prevent
 - Individual Liberty
 - Tolerance for those with different faiths and beliefs
 - Mutual Respect
 - Democracy

Month 7
Working with your
customers / customer
insights & Customer service
performance

- Outcome 1: Skills, Knowledge and behaviours
- Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it
 - Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service
 - Maintain a positive relationship even when you are unable to deliver the customer's expected outcome
 - When managing referrals or escalations take into account historical interactions and challenges to determine next steps

- Outcome 2: Wider Learning
- Equality & Diversity
 - Safeguarding/Prevent
 - The rule and role of law
 - Tolerance for those with different faiths and beliefs
 - Mutual Respect
 - Democracy

Month 8
Service improvement

- Outcome 1: Skills, Knowledge and behaviours
- Analyse the end to end service experience, seeking input from others where required, supporting development of solutions
 - Make recommendations based on your findings to enable improvement
 - Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice

- Outcome 2: Wider Learning
- Safeguarding/Prevent
 - Equality and Diversity
 - Individual Liberty
 - Mutual Respect
 - Tolerance for those with different faiths and beliefs
 - Democracy

Month 9
Develop self/ Ownership/
Responsibility

- Outcome 1: Skills, Knowledge and behaviours
- Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation
 - Exercises proactivity and creativity when identifying solutions to customer and organisational issues
 - Make realistic promises and deliver on them

- Outcome 2: Wider Learning
- Equality & Diversity
 - Safeguarding/Prevent
 - The rule and role of law
 - Tolerance for those with different faiths and beliefs
 - Mutual Respect
 - Democracy

Month 10
Team working/Equality

- Outcome 1: Skills, Knowledge and behaviours
- Work effectively and collaboratively with colleagues at all levels to achieve results.
 - Recognise colleagues as internal customers
 - Share knowledge and experience with others to support colleague development
 - Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer
 - Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment
 - Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer
 - Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment

- Outcome 2: Wider Learning
- Equality and Diversity
 - Safeguarding/Prevent
 - The rule and role of law
 - Individual Liberty
 - Tolerance for those with different faiths and beliefs
 - Mutual Respect
 - Democracy

Month 11
Presentation

- Outcome 1: Skills, Knowledge and behaviours
- Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction
 - Ensure your personal presentation, in all forms of communication, reflects positively on your organisation's brand

- Outcome 2: Wider Learning
- Equality and Diversity
 - Safeguarding/Prevent
 - The rule and role of law
 - Individual Liberty
 - Tolerance for those with different faiths and beliefs
 - Mutual Respect
 - Democracy

Month 12-15
Recap Sessions and
Preparation for EPA





Why Choose TESS?

- 2017 Ofsted Visit gave us a Good rating.
- Investors in People rated us Gold
- Won Apprenticeship Provider of the Year 2016 at the Apprenticeships4England Awards.
- We stand out from the industry as being a Learning & Development Provider with an MD that is CIPD qualified so the focus is definitely on learning!
- Learner & Employer Portal which shows real-time course progress plus allows learners to work on outstanding actions and attend e-learning sessions
- Reporting & Communication - the business has a dedicated Account Manager who is there to help with any queries. We also provide customised 24/7 live reporting to keep you up to speed with value from the apprenticeships.
- Tailored Marketing - we offer bespoke brochures and an online portal where interested learners can find out more about the qualifications. This marketing would have your business logo and input to it, to make it fit for purpose.
- Diverse Qualifications and training solutions for each person & department

For more information, please call 01604 210 500

www.thetessgroup.com





The TESS Group, 28 Queensbridge, Rushmills, Northampton NN4 7BF
01604 210 500 | info@thetessgroup.com | www.thetessgroup.com

