

Customer Service Specialist Level 3 - Scheme of work

Workshop No. and title	<u>Learning Objectives</u> (Please ensure that these are SMART)	Content (Learning Strategies, resources and approaches to manage differentiation)	<u>Assessment Methods</u> (follow the link for assessment ideas)	Addressing key themes (Opportunity to address Employability E&D/ functional skills/ British values and Safeguarding)	Application of learning
<p>Induction Workshop</p> <p>1</p> <p>Doing an Apprenticeship</p>	<ul style="list-style-type: none"> Understand structure of apprenticeship Understand assessment methods available to them Identify safeguarding process Set goals for skills to develop Understand how to use OneFile 	<p><i>Slides</i></p> <p><i>Random equipment x 5 objects</i></p> <p><i>lots of pencils</i></p> <p>Induction</p> <p>Ground rules: Explained through British Values - 5 games (critical thinking)</p> <p>Assessment Methods</p> <p>OneFile</p> <p>Introduce themselves and their role (presentation)</p> <p>Key Contacts and processes</p>	<p>Questioning</p> <p>Assessment</p> <p>Outcome of practical activities</p>	<p>Speaking and Listening</p> <p>Safeguarding to include British Values</p>	<p>Skills scan with manager</p> <p>My role</p>
<p>2</p> <p>The Organisation</p>	<ul style="list-style-type: none"> Understand different organisation structures Identify purpose of organisation values, aims and priorities Identify their key skills and areas of for development Understand key presentation skills 	<p><i>Slides</i></p> <p><i>Random equipment x 5 objects</i></p> <p><i>lots of pencils</i></p> <p>Types of organisation: including private public and third sectors</p> <p>What is a service culture and how is it embedded</p> <p>The difference between organisation's values and aims</p> <p>Their contribution to the organisation</p> <p>SWOT and PDP</p>	<p>Peer assessment</p> <p>Observation</p> <p>Questioning</p> <p>Set tasks</p>	<p>Speaking and Listening</p> <p>Writing</p> <p>British Values</p>	<p>Set before: Prepare 2-minute presentation about their organisation's value and aims (with 2 slides)</p> <p>The value of my skills</p> <p>SWOT/PDP</p>

	<ul style="list-style-type: none"> Identify area to develop in their presentation skills 	<p>Presentation Impact of good presentation Challenge of communication cycle How it's done through communication:</p> <ul style="list-style-type: none"> - verbal - written - presentations <p>Deliver their organisation presentations Give each other feedback</p>			
<p>3 Legislation and Regulation</p>	<ul style="list-style-type: none"> Understand difference between regulations and legislation Identify 4 key legislations and how they impact their roles Identify key policies (including social media) Understand professional behaviours 	<p><i>Slides</i> <i>Jigsaws</i> <i>SWOT worksheets</i></p> <p>The purpose of legislation and regulation, and differences</p> <p>Key Legislation and how it applies to them:</p> <ul style="list-style-type: none"> - GDPR - H&S - Employment Law - Compliance (SG) - COSHH and RIDDOR - Equality Act 2010 <p>Policies what they are and how they apply. Spotlight on on Customer Service and Complaints processes and procedures</p> <p>Importance of digital media practice, social media policies and impact of digital footprint</p>	<p>Observation Questioning Set tasks</p>	<p>Social Media safeguarding Digital Footprints/E Safety Safeguarding legislation Employment Law</p>	<p>How I adhere to legislation and regulation My professionalism (WT/ES)?</p>

		Professionalism in the workplace - contextual importance.			
4 Customer Improvement and Workplace systems	<ul style="list-style-type: none"> Understand importance of customer improvement Recognise the value of different systems 	<p><i>Slides</i></p> <p>Customer Improvement: Customer Loyalty and its impact Evaluating customer service levels - tools to use and strategies to improve Improvement model :Kaizen</p> <p>Systems What systems we utilise and why How to change style across different systems</p>	<p>Observation</p> <p>Questioning</p> <p>Set tasks</p>	Peer Support	<p>What systems do I use at work?</p> <p>Why improve customer service? How will I make the recommendations for improvement?</p>
5 Managing Change	<ul style="list-style-type: none"> Understand external factors affecting their job Identify and explain 2 managing change models Develop strategies to adapt to change Recognise importance of planning and logistics Identify 2-time management techniques 	<p><i>Slides</i></p> <p>Explore external factors causing change through pestle model</p> <p>Managing change models Emotional response, self-motivation in face of change Wellbeing strategies</p> <p>Adapting to change:</p> <ul style="list-style-type: none"> - iterative approach - growth mindset - communication - time management planning and logistics 	<p>Observation</p> <p>Questioning</p> <p>Set tasks</p>	<p>Mental Health</p> <p>Speaking and listening</p>	<p>PESTLE of their organisation and the impact on their roles</p> <p>How I managed a Change using a model</p> <p>Time management techniques</p>
6	<ul style="list-style-type: none"> Understand 7 principles of 	<p><i>Slides</i></p> <p>Listening game</p>	<p>Observation</p> <p>Questioning</p>	Safeguarding around	Example of helping and feedback from

Stakeholders	<p>stakeholder management</p> <ul style="list-style-type: none"> Identify different communication approaches for different stakeholders Develop strategies to implement professional boundaries Develop strategies for active listening and effective questioning 	<p>Stakeholders Defined</p> <p>Key Principles</p> <p>Communication</p> <ul style="list-style-type: none"> Stakeholder Quadrangle Active Listening Effective Questioning Taking initiative <p>Boundaries (safeguarding referral/ LADO if uncomfortable)</p>	Set tasks	<p>inappropriate colleagues</p> <p>Speaking and Listening</p>	<p>colleague helped</p> <p>Stakeholder map</p> <p>Prepare example presentation of negotiation and influence (2 mins, 2 slides)</p> <p>Example of using open and closed questions to help customers</p>
<p>7</p> <p>Challenging relationships</p>	<ul style="list-style-type: none"> Understand importance of diversity and inclusion Identify common areas of bias Develop strategies to resolve conflict in the workplace Develop strategies to negotiate and challenge effectively 	<p><i>Slides</i></p> <p>Presentations of negotiation and influence</p> <p>Impact of Diversity and Inclusion at work</p> <p>Unconscious vs Conscious Bias</p> <p>Counteracting bias</p> <p>Conflict at work examples</p> <p>Challenging in a professional way</p> <p>Escalating up to a manager</p> <p>De Escalating situations</p> <p>Gossip</p> <p>Conflict resolution techniques</p> <p>5 animals of conflict</p>	<p>Peer Assessment</p> <p>Observation</p> <p>Questioning</p> <p>Set tasks</p>	<p>Presentation skills</p> <p>Speaking and Listening</p> <p>E&D</p> <p>Conflict resolution</p>	<p>How I communicate to foster positive relationships, respect diversity and overcome relationship challenges</p> <p>Witness testimony</p> <p>Add slides from presentation</p>
	<ul style="list-style-type: none"> Understand life cycle of a project 	<p><i>Slides</i></p>	<p>Observation</p> <p>Questioning</p>	<p>Speaking and Listening</p>	<p>Project Report</p>

<p>8</p> <p>Project Management</p>	<ul style="list-style-type: none"> Identify 5 key project management tools Recognise different approaches to project management, i.e., iterative, waterfall etc Understand management of stakeholders during projects 	<p>Tools throughout the day as activities/games</p> <ul style="list-style-type: none"> RACI / Stakeholder Matrix Gantt / WBS SWOT Cause & Effect / Decision Tree Critical Path / PERT Chart <p>Project report elements How they tie in with lifecycle</p> <p>Risk Assessments: Risk Mapping</p> <p>Project Tools, why so important Project approaches Practice by thinking of how to embed inclusion in team?</p> <p>Stakeholders and projects</p> <ul style="list-style-type: none"> negotiating influencing monitoring 	<p>Set tasks</p>	<p>E&D</p>	<p>Smaller project example Practice tools</p>
<p>9</p> <p>Customer Journey</p>	<ul style="list-style-type: none"> Describe difference between customer needs and expectations Consider how you adjust your response for different customers Identify the customer journey in 	<p><i>Slides</i></p> <p>Internal and External customers: their needs, wants, expectations and satisfaction</p> <p>The elements which change customer expectations</p> <p>Keeping an organisation customer focused Building a customer journey:</p> <ul style="list-style-type: none"> Mapping Touch Points Brand Promise 	<p>Observation</p> <p>Questioning</p> <p>Set tasks</p>	<p>Peer Support</p>	<p>Your customer's needs, expectations and wants.</p> <p>Your customer journey</p> <p>Why is building trust with customers so important?</p> <p>What areas could be improved for</p>

	your organisation				your customer's experience?
10 Decision Making	<ul style="list-style-type: none"> • Understand good decision-making techniques • Identify judgement calls they have made • Recognise importance of reflection • Understand key finance terminology 	<i>Slides</i> Decision making techniques Where do they make judgement calls? Presentation of a judgement call Decisions in reporting Decisions involving money <ul style="list-style-type: none"> - Within work - Within personal lives - Payslips - Tax 	Observation Questioning Set tasks Peer Assessment	Money matters Speaking and Listening	Example of Report writing Evidence of finance process they are involved in Why is cost an important part of meeting business and customer needs?
11 Initiative and Development	<ul style="list-style-type: none"> • Understand importance of self-development • Identify impact of feedback • Develop strategies to make most of feedback • Identify areas for self-development • Develop strategies to build initiative 	<i>Slides</i> Problem solving throughout day Importance of feedback Capitalising on feedback Self-development: SWOT and PDP (update) Initiative strategies Identifying problems and solving them "Showing Off" - to managers, in interviews, on CVs Importance of showing off for self esteem	Observation Questioning Set tasks	CV writing Speaking and Listening Writing	Example of Proposal Evidence of SWOT/PDP update How do I accept positive and negative feedback?
12	<ul style="list-style-type: none"> • Understand EPA process 	<i>Slides</i> <i>Workbook pp</i>	Peer Assessment	Speaking and Listening	//

EPA Prep	<ul style="list-style-type: none">Identify next steps to enhance their assessment	Workbook's introduction Multiple choice key terms quiz Key skills in Interview Key skills in presentation Mock presentations and group feedback	Observation Question		
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