



A

MODERN APPRENTICESHIP

IN

Customer Service Level 2

(Incorporating Contact Centre Operations)

**FRAMEWORK DOCUMENT
FOR
SCOTLAND**

Skills CFA

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Modern Apprenticeships in Scotland

What are Modern Apprenticeships?

Modern Apprenticeships offer those aged over 16 paid employment combined with the opportunity to train for jobs at craft, technician and management level.

Who develops them?

Modern Apprenticeships are developed by Sector Skills Councils (SSCs). SSCs consult with employers and key partners in their sector to produce a training programme, which meets the needs of employers.

Who are they for?

Modern Apprenticeships are available to employees aged 16 or over. Employees need to demonstrate to their employer that they have the potential to complete the programme.

What's in a Modern Apprenticeship?

In Scotland, there are more than 70 different Modern Apprenticeship Frameworks and they are all designed to deliver a training package around a minimum standard of competence defined by employers through SSCs. There are four different levels of Apprenticeship in Scotland:

- A relevant SVQ (or alternative competency based qualifications)
- Core Skills
- Industry specific training

Details of the content of this specific Modern Apprenticeship are given in the next section.

Modern Apprenticeship in Customer Service and Contact Centre Operations at Level 2

In an increasingly service-led economy, customer demand for better and more individualised service is set to continue to increase. There is a need to raise customer service standards and increase the supply of people with customer service skills. Employers in Scotland have a major role to play in this and most employers acknowledge their need to up-skill their current workforce and recruit new staff. The existing workforce needs to be up-skilled and new people attracted into customer service or contact centre job roles. As competition grows and social networking is increasing, customer expectations are continuously rising. To meet these challenges, employers are now finding 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.

Employers are therefore under pressure to keep up with, and exceed, changing customer expectations and the increasing need for customer satisfaction and loyalty. This applies equally to the public, private and third sectors. Those employers who are making progress in improving their service delivery are acting on three broad but inextricably linked fronts: their strategy and culture; their processes, and their people. Contact centres have now also got a role to play in this with continued growth in the use of technology and social media.

In the case of their people, employers are increasingly recognising the importance of instilling a customer service ethos throughout their organisations, not least in terms of the relationships between people within the organisation. Many employers are putting particular emphasis on the skills of staff that are in direct contact with the customer, recognising that it is they who play a major role in determining the quality of the customer experience. This has driven the establishment of customer service as an occupational area in its own right, with a growing number of people in jobs where the primary performance requirement is to deploy customer service skills.

The importance attached to customer service by employers has been a relatively new phenomenon. However, customer demands are now driving the new service led economy through the 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.

The shift in power from organisations to customers, particularly in terms of customer expectations and loyalty, is now defining the way that organisations engage with customers. Customer demands are now leading the way and organisations and their staff have to adapt and respond by using a wider range of technological, social and networking tools to engage with and respond to higher levels of service for customers. As customers now increasingly expect an instant response and consistently high levels of service when dealing with an organisation they also expect this from the individual customer service staff.

Employers in all sectors continue to report significant changes in customer behaviour resulting from enhanced expectations about the standard of service customers expect to receive, and customers now demonstrate:

- a much greater willingness to complain
- a demand for faster response times
- a stronger propensity to make cross-sector and/or organisational comparisons about service standards
- a desire for services which are tailored to their individual needs.

These changes in customer behaviour impact significantly on employees who can no longer be complacent and must meet new challenges to satisfy the customer. The technological and social skills needed in customer service have now been revisited and amended in both the Contact Centre Operations National Occupational Standards (NOS) (May 2011) and the Customer Service National Occupational Standards (NOS) (February 2013) which includes new Standards that reflect the growing impact of Social Media.

Given the reasons discussed above it is important that new Customer Service Modern Apprenticeships have been developed that reflect the wider skills needed for customer service in the future. In particular, evidence from recent Customer Service Labour Market Intelligence (Skills CFA, 2012) shows that:

- *the customer service pan-sector area employs 56,800 in Scotland¹*
- *Scotland has the highest employment (8 per cent) for sales and customer service occupations amongst all the UK Nations²*
- *Skills for Scotland³ have identified that softer skills such as customer service, teamwork, problem solving etc. are fundamental to long-term economic goals in Scotland, and can be crucial to the productivity and success of the Scottish Economy*
- *sales and customer service occupations in Scotland constitute 17 per cent of vacancies across all occupations with 7,000 vacancies⁴ available at the point of publication of the 'Skills in Scotland, Social Research' report 2010*
- *the overall picture of skills lacking for Scottish employers puts customer handling skills (64 per cent) as the biggest skill shortage area⁵*
- *evidence in Scotland shows that sales and customer service occupations have the highest number of employees with skills gaps at 9 per cent.⁶*

In addition, *Future Skills Scotland – the Scottish Labour Market 2006* predicted that by 2014 there will be 49,000 customer service jobs in Scotland, an increase of 13,000 since 2004. The report states that 'sales and customer service' are one of three occupations "projected to dominate employment growth" in Scotland by 2014 with a 12 per cent growth in the market, leading to a 73,000 replacement demand, and 98,000 job openings by 2014.

Customer Service and Contact Centre Job Roles

Customer service requires generic skills which are in demand in wide-ranging job roles across sector and organisational boundaries. Many employers in the private, public and third sectors now recognise that customer service is a strategic issue which impacts on organisational reputation and success and that the development and improvement of customer service requires action in the areas of organisational strategy and culture, the processes that underpin service delivery and the skills of those involved in delivering and supporting customer service delivery.

Employers are recruiting new staff solely dedicated to customer service whilst also developing the skills of existing staff who are in direct contact with customers, recognising that it is they who play a major part in determining the quality of the customer experience.

There are a growing number of individuals whose 'occupational identity' is 'customer service', i.e. because the primary

¹ *Customer Service LMI, SkillsCFA, 2012*

² *UKCES (2011) Skills Almanac 2010, page 83*

³ *Skills for Scotland: Accelerating the Recovery and Increasing Sustainable Economic Growth, Smarter Scotland, October 2010*

⁴ *Scottish Government (2011), Skills in Scotland, Social Research 2010*

⁵ *SESS 2010, page 22*

⁶ *Ibid*

function of their job role is customer service, and whose career in customer service will take them from organisation to organisation, department to department, and sector to sector. In addition, the growth of contact centres in Scotland, and the customer service and technical skills that they now bring to the customer service arena, compliments the skills that are now available and gives new opportunities for learners to choose their preferred routes through these skill areas.

Job Titles for Customer Service	Job Titles for Contact Centre Operations
Level 2	Level 2
Customer Service Trainee	Contact Centre Agent
Customer Service Assistant	Trainee Agent
Customer Service Advisor	Help Desk Operative
Customer Service Administrator	Sales Advisor
Customer Service Representative	Customer Service Advisor
Customer Service Agent	Outbound Sales Agent
Customer Service Officer	Inbound Sales Agent
Customer Liaison Officer	Telesales Operator
Customer Liaison Assistant	Telephone Banking Advisor
Customer Liaison Executive	Contact Centre Agent
Customer Service Clerk	Trainee Agent

Customer Service Modern Apprenticeship take-up

For the year 2011 – 2012 there were 1,177 customer service modern apprentices in training in Scotland with 1,122 achievers across all ages with 58 per cent female and 42 per cent male⁷.

In the period 1st April 2012 – 28th Sept 2012, of those in training⁸:

- 290 were aged 16-19 and of these 52 per cent were female
- 309 were aged 20-24 and of these 60 per cent were female
- 641 were aged 25+ and of these 61 per cent were female.

In terms of previous take-up, in 2010-2011 there were 1171 modern apprentices in training, therefore little change in take-up was found between 2010 and 2012. In addition there was a similar male/female divide in 2010 as in 2012.

The results found in these statistics demonstrate that, although historically customer service and customer service skills have been seen as the province of females, there is a fairly even split between males and females involved in Customer Service Modern Apprenticeships today. These results show that opportunities now exist for both males and females in customer service or contact centre job roles with the benefits of using the transferable skills that this apprenticeship offers across many sectors.

The opportunities are now in place for more Customer Service Modern Apprenticeship recruitment and for up-skilling existing staff. As discussed above, there is now a need to address customer service issues in Scotland, including:

Skills Shortages and Skills Gaps

Historically, research in terms of skills gaps and shortages has generated the term 'customer handling' for organisations working across most sectors. This term is now consistently used by employers, researchers, SSCs and other bodies to measure working practices with customers. This terminology has grown over several years and, in particular, has been developed for the measurement of the customer service and contact centre skill areas, as shown below:

Skills shortages

The skills which employers consider are lacking most in applicants in Scotland are shown below, all of which are key skills in

⁷ SDS, National Training Statistics, Modern Apprenticeship programme – All ages, 2011-2012

⁸ SDS, National Training Statistics, Modern Apprenticeship programme by Ages 16-19; 20-24; 25+ – 1st April 2012 - 28th September 2012

contact centre and customer service job roles:⁹

- customer handling skills (64 per cent)
- planning and organising (62 per cent)
- oral communication skills (61 per cent)
- other technical and practical skills (60 per cent)
- problem solving skills (59 per cent)
- team working skills (55 per cent)

Skills Gaps

Evidence shown below illustrates that the most 'common skills' lacking among employees with skills gaps are as follows:

- planning and organising (59 per cent)
- problem solving skills (57 per cent)
- **customer handling (51 per cent)**
- team working skills (50 per cent)

All of the main skills gaps cited here are also softer skills and again are prevalent in terms of customer service and contact centres.

- *skills gaps in customer service that are prevalent*
- *the need for softer skills for productivity and success*
- *7,000 vacancies for customer service occupations*
- *skills lacking in customer service, as the biggest skill shortage area.*

Employers recognise the key role customer service staff play in determining the quality of the contact centre experience. Therefore, there is a need to raise customer service and contact centre standards by increasing the supply of people with high level skills. To do this customer service or contact centre employers, for example, might want to up-skill their current workforce and/or recruit new staff. Customer Service Modern 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 and contact skills in the workplace, as shown below.

The main objectives of the Level 2 Customer Service Framework and Contact Centre Pathway is to:

- increase the supply of people with high levels of customer service and customer handling skills to address the skills gaps and shortages found in organisations
- tap into the skills and talents of a diverse population through providing flexible entry routes into a career in customer service or the contact centre pathway
- equip individuals with the skills, knowledge and experience needed to provide excellent customer service and contact centre skills in a range of sectors
- provide apprentices with an opportunity to develop the skills, knowledge and experience they need to progress on to roles with additional responsibilities.

⁹ Source: The Scottish Government (2011) *Skills in Scotland 2010*. Scottish Government. Social Research.4.1

Summary of Level 2 Customer Service and Contact Centre Operations Framework

Diagram showing the contents of the Level 2 Modern Apprenticeship in Customer Service and Contact Centres Operations

Mandatory outcomes

SVQ Level 2

One of the following must be achieved:

SQA	SVQ 2 Customer Service at SCQF Level 5	GL0F 22: SCQF Overall Credit: Min 29: Max 44
Pearson Education Limited	SVQ 2 Customer Service at SCQF Level	GL00 22: SCQF Overall Credit: Min 29: Max 44
SQA	SVQ 2 Contact Centre Operations at SCQF 5	GF05 22: SCQF Overall Credit: Min 24: Max 46

Core Skills

- Communication SCQF Level 4, 6 SCQF Credit Points
- Working with Others SCQF Level 4, 6 SCQF Credit Points
- Problem Solving SCQF Level 4, 6 SCQF Credit Points
- Information and Communication Technology SCQF Level 4, 6 SCQF Credit Points
- Numeracy SCQF Level 4, 6 SCQF Credit Points

All Core Skills must be separately certificated.

Enhancements

No enhancements are required for the Level 2 Customer Service Pathway

One of the enhancements shown below must be chosen for the Level 2 Contact Centre Operations Pathway
Core Skills in Communication at a higher level (Level 5 or above)

Or

One additional unit from an SVQ at Level 2 or above, relevant to the apprentice's job role

Or

One additional unit from the Contact Centre Operations SVQ at Level 2 or Level 3

Optional Outcomes

Additional SVQ Units/Qualifications/Training

No other awards, qualifications or training programmes are required

The Level 2 Customer Service and Contact Centre Operations Framework

The mandatory and optional content of the Level 2 Modern Apprenticeship in Customer Service and Contact Centre Operations is as follows:

Mandatory Outcomes

SVQ(s)

Modern Apprentices will be required to undertake one of the two SVQ pathways, namely Customer Service or Contact Centre Operations. Each apprentice is required to achieve one of the following Qualifications:

SQA	SVQ 2 Customer Service at SCQF Level 5	GL0F 22: SCQF Overall Credit: Min 29: Max 44
Pearson Education Limited	SVQ 2 Customer Service at SCQF Level 5	GL00 22: SCQF Overall Credit: Min 29: Max 44
SQA	SVQ 2 Contact Centre Operations at SCQF 5	GF05 22: SCQF Overall Credit: Min 24: Max 46

Scottish Vocational Qualifications (SVQs) are work-based qualifications, which are based on National Occupational Standards of competence drawn up by representatives from each industry sector. SVQs are made up of units – normally between six and ten – which break a job down into separate functions reflecting the different kinds of activities of a job. SVQs are available at five levels – although most are at level 2 and level 3. When someone has achieved an SVQ, there is a guarantee that they have the skills and knowledge needed to do their job. All Scottish Modern Apprenticeships must contain a relevant SVQ or equivalent qualification.

Core Skills

Each apprentice is required to achieve the following core skills:

• Communication	SCQF Level 4, 6 SCQF Credit Points
• Working with Others	SCQF Level 4, 6 SCQF Credit Points
• Problem Solving	SCQF Level 4, 6 SCQF Credit Points
• Information and Communication Technology	SCQF Level 4, 6 SCQF Credit Points
• Numeracy	SCQF Level 4, 6 SCQF Credit Points

All Core Skills must be separately certificated

Core Skills are skills and abilities which everyone needs in their work. This is true for every job in every workplace. Core Skills also feature in National Qualifications such as Standard Grades and Highers and from 2000 Scottish candidates have been issued with a Core Skills profile on their Scottish Qualifications Certificate. Candidates who have already been certificated as achieving Core Skills at the levels given above – either in the workplace or at school or college - do not need to repeat these Core Skills as part of the Modern Apprenticeship Framework.

Enhancements

No enhancements are required for the Level 2 Customer Service Pathway
One of the enhancements shown below must be chosen for the Level 2 Contact Centre Operations Pathway
Core Skills in Communication at a higher level (Level 5 or above)
Or
One additional unit from an SVQ at Level 2 or above, relevant to the apprentice's job role
Or
One additional unit from the Contact Centre Operations SVQ at Level 2 or Level 3

Optional Outcomes

There are no optional outcomes

Registration and certification

This Scottish Modern Apprenticeship is managed by Skills CFA. The SSC is the first point of contact in Scotland for any enquiries in relation to the Framework. Contact details:

Skills CFA
Unit 110, Linton House
164-180 Union Street
London
SE1 0LH
info@skillscfa.org
Tel: 020 7091 9620

The SSC will register all Scottish Modern Apprentices undertaking these Frameworks. **All Modern Apprentices must be registered with the SSC within 8 weeks of starting their apprenticeship.** Registration can be made by completing the Sample Training Plan and Sample Training Agreement in Appendix 3 and sending these to the above address or completing the online registration system (MA Online, www.maonline.org.uk). In the case of MAs which receive funding it is acceptable for the Skills Development Scotland Training Plan to be used on the condition that it includes all relevant information as set out in the MA Training Plan.

The SSC will issue a Modern Apprenticeship Certificate of Completion to those Modern Apprentices who have completed the mandatory outcomes of the Framework. Before a certificate is issued, training providers must submit evidence to the SSC that the mandatory outcomes have been achieved. This will normally be in the form of photocopies of certificates from awarding bodies.

Requests for registration and certification should be made to the SSC at the address above.

SkillsCFA Service Level

SkillsCFA undertakes to confirm the registration of candidates in writing within 8 weeks of receipt of the relevant Training Plan and Training Agreement. Each candidate will be issued with a unique registration number.

SkillsCFA also undertakes to issue Certificates of Completion within 4 weeks of receipt of the appropriate evidence that a candidate has completed the outcomes as stated in the Training Plan.

Recruitment and selection

The recruitment and selection of Modern Apprentices is primarily the responsibility of the employer. However, the following guidance is given:

- Employees may enter a Modern Apprenticeship from the age of 16. There is no upper age limit.
- The Modern Apprenticeship is designed to attract high quality people to the industry. Achievement of academic qualifications is one way of assessing the suitability of applicants. However it should be stressed that no persons should be deterred from applying for a Modern Apprenticeship because of a lack of formal educational qualifications. As well as traditional qualifications such as Standard Grades and Highers, employers should also be aware of newer vocational qualifications or vocational activity undertaken outwith an academic institutions, such as volunteering activity.
- The following factors may also influence the selection process:
 - performance during a formal interview process
 - references
 - relevant work experience
 - trial observation period.
- Employers should be aware of the nature, relevance and quality of foreign qualifications and make appropriate allowances concerning entry requirements.
- In order to promote and maintain the high status of the Modern Apprenticeship within the industry all literature distributed for recruitment purposes should emphasise the high standards of achievement expected of the candidate.
- Employers may wish to contact the SSC for advice and guidance on recruitment and selection.

There are no specific sectoral or cross sector requirements for entry on to the Customer Service or Contact Centre Operations Modern Apprenticeship Frameworks.

Equal opportunities

Modern Apprenticeships should ensure that there is equality of opportunity for all and any barriers (real or perceived) are addressed to support anyone seeking to enter employment to undertake the Modern Apprenticeship.

All MAs supported by Skills Development Scotland must conform to any contractual requirements on equal opportunities. All employers of Modern Apprentices should have an Equal Opportunities policy statement.

Health and Safety

All aspects of health and safety at work must be recognised within the delivery of this Modern Apprenticeship Framework and all statutory requirements be adhered to.

It is a key aspect of the induction period of the Modern Apprenticeship that apprentices are fully informed both of the regulations and that they and their employers are bound by these regulations. Modern Apprentices should be made aware of their rights and duties with regard to health and safety.

All Modern Apprentices supported by Skills Development Scotland will be required to satisfy the adequacy of SDS's Health and Safety policy and systems.

Contracts

The following three contracts are essential to the successful outcome of the Modern Apprenticeship programme:

1. Contract of employment signed by the employer and the Modern Apprentice.
2. SSC Training Agreement - this agreement outlines the basis of the modern apprenticeship, refers to the contract of employment and includes Health and Safety responsibilities.
3. SSC Training Plan - this plan outlines the selected outcomes and the expected duration of the apprenticeship. In cases where funding is offered by SDS, the SDS Training Plan will be sufficient on condition that it contains all relevant information as set out in the MA Training Plan at Appendix 2. Training Plans may be modified to reflect changing circumstances; however it is essential that the SSC is notified of any changes.

Employment status of Modern Apprentices

It is important that the sector offers genuine employment and career prospects to those people it wishes to attract through Modern Apprenticeships. Accordingly, **all apprentices must be employed for the duration of the apprenticeship.**

Terms and conditions of employment

In order to compete with other sectors offering Modern Apprenticeships, attractive packages will need to be developed by employers in the sector. The terms and conditions of employment for individual Modern Apprentices will be agreed between the employer and the apprentice and should form the contract of employment.

Training and development

Delivery

Training delivery can take many forms under the Modern Apprenticeship system. Some organisations may become approved SVQ Assessment Centres; others may join a consortium or use peripatetic assessors. Some large employers will be able to complete all the training and development in-house, but most employers will find that some of the training and development will have to take place away from the normal workplace. In particular the underpinning knowledge requirements are often more suited to delivery by outside training providers which might include:

- private training organisations
- colleges / universities
- other employers

Such knowledge could be delivered through training courses or through open/distance learning packages.

The option of sharing training and assessment resources amongst a cluster of employers (or across the divisions of a larger employer) will be particularly appealing to those firms which do not have the resources to provide all of the training and development. Assessment can be provided by these bodies, but the assessors and the training centre must be approved by the awarding bodies for the SVQ and Core Skills where appropriate.

The following organisations were approved by SkillsCFA to deliver the Modern Apprenticeships at Level 2 and Level 3 in Customer Service in December 2012.

Existing Customer Service Centres December 2012	
Aberdeen & Grampian Chamber of Commerce	Kwik Fit Financial Services
Angel Training	Limelight Careers Ltd
Angus College	MGT Training Ltd
Borders College	MI Technologies Ltd
BT Group PLC	Microcom Training
Capita Learning and Development	Minerva People Limited
Carnegie College	Motherwell College
Competence Matters	Muir Slicer Associates Ltd
Cothrom Ltd	Perth & Kinross Council
E3 Partnership Ltd	Remit – Scotland
EKGTA	Rewards Training – Glasgow
Elmfield Training Ltd	Rhino Training Limited
First Response Training	Ried Kerr College
Forte Business Consultants Ltd	Robert Wiseman Dairies PLC
Genius People	Sixth Sense Training
Glasgow City Council	Skillnet Limited
Glasgow Council for the Voluntary Sector (GCVS)	SPX Lagta
GTG Training Ltd	Strathearn Training
HSC Futures Ltd	Talent Training
IBM UK Ltd	The Real Apprenticeship Co
Intec Business Colleges	The Tell Organisation Ltd
Intraining Group Ltd	Topic Training Grampian LTD
ITP Training Ltd	Training for Travel Ltd
JHP Training Scotland East	Unique Solutions
JMG Training and Development LTD	XL Training Ltd

The SSC training plan

The plan is required to identify:

- 1 The selected Framework outcomes, specifying whether or not separate certification of the Core Skills is being sought.
- 2 A summary of the Modern Apprentices accredited prior learning
- 3 A timetable for achievement of the selected Framework outcomes, linked to regular progress reviews.

The Training Plan should take into account any relevant previous training and development, education or work experience. Not all Modern Apprentices need have different plans, but many will vary. Moreover as reviews take place and circumstances change so the plan itself can be modified.

However any changes must:

- be subject to the quality provisions of Skills Development Scotland (if the MA is being financially supported)
- comply with the stipulations of this Framework
- meet the needs of the employer and apprentice.

A sample Training Plan is provided at Appendix 3 of this document, however, for those Modern Apprentices funded by SDS area office it is sufficient to submit the Skills Development Scotland Training Plan on condition that it covers the same information required in the MA Training Plan.

Consultation Process

Customer Service Framework 2012

The development of a new Functional Map and revision to the Final National Occupational Standards (NOS) in Customer Service were both approved in February 2013. In addition the following documents have also been approved by SQA Accreditation:

- Credit and Levelling of the NOS for the Scottish Credit and Qualification Framework (SCQF)
- Customer Service SVQs at Levels 1 to 4
- Core Skills Signposting and,
- a Scottish Assessment Strategy.

Skills CFA expects all of these to be accredited by the end of February.

A Customer Service Steering Group was set up to help and oversee the development of the Customer Service NOS and Functional Map and, as these organisations are based UK wide, they have continued to give us help and support with the development of the work in Scotland due to the revision of the Customer Service SVQs and Modern Apprenticeships.

Organisations taking part in the Customer Service Steering Group are shown below:

- ASDA
- British Printing Federation
- BT Retail & Business
- City Link
- Customer First UK
- De Vere Academy of Hospitality
- Federation of Small Businesses
- Flybe
- Hays Travel

- HSBC
- Scottish and Southern Energy
- SQA Accreditation.

Expert Panel Members

Expert Panel members were convened to develop revised Customer Service Level 1-4 SVQs; undertake SCQF Credit and Levelling, and Core Skills Signposting for Scotland. These were:

- Alistair Fife – SQA Accreditation
- Linda Orr – City and Guilds
- John Mclarty – Consultant
- Ana Abreu – Edexcel
- Nathan Cookson – EDI
- Elaine Snell – SQA Awarding Body.

The steering groups and expert panel were supported through direct consultation with employers throughout the full development process.

To aid this, an on-line consultation has been carried out to inform the content of the revised Customer Service SVQ qualifications and Modern Apprenticeships in Scotland to ensure that they reflect employer's needs, are fit for purpose, and offer an up to date and relevant programme of qualifications and training in customer service for Scotland.

Importantly, the consultation also asks whether the Customer Service SVQs and Modern Apprenticeships are still important for the Scottish Economy and whether these skills are still required by employers based in Scotland. Answers to these questions are seen as vital so that Skills CFA can evidence the need for the continuation of customer service occupations in Scotland.

The survey has given employers, providers and learners the opportunity to influence the content of the Customer Service Modern Apprenticeships and the SVQs they contain.

The Customer Service on-line Survey

Skills CFA developed an on-line survey entitled 'Customer Service Qualifications and MA Survey for Scotland 2012', which was available from 28th November 2012 to 4th January 2013. We allowed the survey to run across the Christmas and New Year holiday period in order to gain more participants. Skills CFA circulated a link to the survey via our LinkedIn networks, which has 16,500 members, and via the monthly eBriefing for Skills CFA, which goes out to 3,800 contacts across the UK.

We also post updates on Twitter, sharing news about what is happening and the survey link with more than 1,000 twitter followers. Finally, we also circulated an email to all of the current MA Centres (130) working with Skills CFA in Scotland and asked them to circulate the link to their employer contacts.

Following this full consultation process 31 responses were received with 22 named individuals responding to the on-line survey, alongside 9 who completed the survey but did not give their personal details e.g. name, organisation etc. Skills CFA policy is to allow those who do not want to provide participant details to participate anonymously.

A list of those organisations that participated and showed their contact details are shown below. Where there are two responses from the same organisation this indicates that two separate individuals from the same organisation participated in the survey.

Aberdeen & Grampian Chamber of Commerce
Angus Council
Arches
Competence Matters
Competence Matters
DM Training Consultants Ltd

EKGTA
First4Skills
GCVS
GTG Training Ltd
ITCA Ltd
NHS Greater Glasgow & Clyde
Pera Training
Perth and Kinross Council
Renfrewshire Council, Environmental Services
Scottish Ambulance Service
Sixth Sense Training
Strathkyle Training
Tell Organisation
The Tell Organisation
Tinline
XL TRAINING

Main Headline Results of Survey

- All participants were based in Scotland and the range of sectors involved included; Administration, Management, Hospitality, Retail, Sales, all public sector services, Engineering and Business.
- 50 per cent of participants were Training Providers, 20 per cent were employers, 17 per cent were from the public sector, 6.5 per cent were from Not-for-Profit organisations, and 6.5 per cent from Colleges.
- 43 per cent of participants were from large organisations (250+ employees), 30 per cent were from small organisations (5-50 employees), 13.5 per cent were medium sized organisations (51-249) and 13.5 per cent were from Micro organisations (1-5 employees).
- 92 per cent of those who responded thought that customer service qualifications would help raise skills levels and improve the Scottish Economy.
- 87.5 per cent of those who responded thought that Modern Apprenticeships would raise skill levels and improve the Scottish economy.
- 100 per cent of those who responded thought that customer service qualifications would help employers and organisations to raise their customer service levels.
- 96 per cent of those who responded thought that Customer Service Modern Apprenticeships would help to raise their organisations customer service levels.
- 96 per cent of respondents thought that the skills needed for customer service has changed over the past 3 years citing:
 - the rise of social media/networking (96 per cent)
 - rising customer demands (85 per cent)
 - rising customer expectations (84 per cent)
 - changes to organisational practices and policies (81 per cent)
 - more comparisons made between goods and services (19 per cent).

Respondents rated social media and networking as the most influential factor in changing customer service skills in their organisation.

The detailed information regarding the revised content of the Modern Apprenticeships in Customer Service shows that the majority of all respondents agreed the following:

1. The majority of respondents stated that the revised draft SVQ structures at Levels 1 to 3 were fit for purpose.
2. 62 per cent of respondents stated that they had used SVQs before, whereas 9 per cent had not used SVQs before, and 29 per cent did not know!
3. The majority of respondents agreed with the core skills recommendations made in the survey.
4. The majority of respondents chose the preferred mandatory enhancements at Level 3.

Contact Centre Operations pathway - 2012

The development of a new Functional Map and National Occupational Standards (NOS) in Contact Centre Operations were approved in 2011. This was followed by the development and approval of:

- Credit and Levelling of the NOS for the Scottish Credit and Qualification Framework (SCQF)
- Contact Centre Operations SVQs at Levels 1 to 4
- Core Skills Signposting and,
- a Scottish Assessment Strategy.

All were approved by SQA Accreditation in Jan/Feb 2012.

Two steering groups were set up during this time and 4 meetings were held. One steering group focused on employers and included groups of contact centres who had large numbers of employers involved e.g. Call North West, whilst the other steering group focused on emergency services. Organisations taking part in the steering groups are shown below:

Contact Centre Operations Steering Group

- Call North West
- Call Centre Wales
- ASDA – UK Wide
- HSBC – UK Wide
- BT – UK Wide
- John Lewis – UK Wide
- West Cheshire College
- John Lewis- UK Wide
- Customer First UK – UK Wide
- UCLAN = UK Wide

Emergency Services Contact Centre Operations Steering Group

- Thames Valley Police
- Skills for Justice
- National Policing Improvement Agency
- Call North West
- Kent Police
- Gloucestershire Police
- Thames Valley Police
- Skills for Justice
- NHS 24 - Scotland
- Kent Police

Expert Panel Members

Expert Panel members were convened to develop Levels 1-4 SVQs; undertake SCQF Credit and Levelling, and Core Skills Signposting for Scotland. These were:

- Alistair Fife – SQA Accreditation
- Linda Orr – City and Guilds
- John Mclarty – Consultant
- Ana Abreu – Edexcel
- Nathan Cookson – EDI
- Elaine Snell – SQA Awarding Body

The steering groups and expert panel were supported through direct consultation with employers throughout the full development process. The various aspects of the consultation process involved 158 employers and providers,

who were sent an invitation to take part via email and/or telephone, with follow up calls and emails when there was no response. However, of these, only 10 organisations responded positively to the invitations.

Of the 10 organisations who took part in the consultation process, six were large contact centre organisations from the private sector. The locations of these contact centres in Scotland are shown below in addition to the sectors that they work in, and the number of employees they represent.

Location of regions in Scotland	
ASDA	Kilmarnock
DDL Group	Argyll, Bute
HSBC/FIRST DIRECT	Hamilton
John Lewis	All Regions
IBM UK	Inverclyde
BT Business/BT Retail	Dundee, Glasgow, Alness
Standard Life	Edinburgh, Glasgow

Sectors represented in Scottish Contact Centres	
ASDA	Retail
DDL Group	Distribution, Central Government, Financial Service, Leisure and Tourism, Ecommerce/mail order
HSBC/FIRST DIRECT	Financial Services
John Lewis	Retail
IBM UK	Central Government, Financial Services, Healthcare, IT, Retail, Leisure, Travel and Transport
BT Business/BT Retail	Telecommunications
Standard Life	Financial Services

These seven organisations represent 7,614 employees in contact centres in Scotland, as shown below:

Number of employees working in Contact Centres Contact Centre Operations Survey 2011		
	Scotland	UK
ASDA	65	700
DDL Group	25	0
HSBC/FIRST DIRECT	1,600	2,200
John Lewis	400	600
IBM UK	3,000	25,000
BT Business/BT Retail	524	429
Standard Life	2,000	N/A
	7,614	28,929

Although Skills CFA recognises that the main market for a Contact Centre Operations Modern Apprenticeship will usually be in private sector organisations, it was also felt that it was important to give public sector organisations the opportunity to participate in the consultation. Accordingly, Skills CFA contacted public sector organisations and training providers which generated four additional responses.

The sectors and regions that these organisations represent are shown below:

Other Respondents	Sectors represented	Regions represented
South Ayrshire Council	Local Government	Ayrshire
Dundee College	Charity, Distribution, Healthcare, IT	Tayside
GTG Training Ltd	Financial Services, Healthcare, Motor Vehicle, Utility/energy	All
Carnegie College	Leisure and Tourism	Fife

Main Headline Results for the Contact Centre Operations Survey

- All participants were based in Scotland and the ranges of sectors involved included 7 large multinational organisations representing the following sectors; Retail, Distribution, Central Government, Financial Services, Leisure and Tourism, Ecommerce/Mail Order, Healthcare, IT, Travel and Transport and Financial Services.
- Other participants included 2 colleges, 1 local council and 1 training provider, who were involved in the following sectors; Local Government, Charity, Distribution, Healthcare, IT, Financial Services, Motor Vehicle, Utility/Energy, and Leisure and Tourism.
- 100 per cent of respondents agreed that communication skills, customer service skills, working with others and basic literacy skills were the most important skills that an apprentice must have in a contact centre.
- 100 per cent of respondents stated that a Contact Centre Modern Apprenticeship would be useful for their organisation.
- 100 per cent of respondents stated that they would be interested in using the Level 2 or Level 3 Contact Centre Modern Apprenticeship, or both.
- 45 per cent of respondents stated that their organisation would benefit from using a Contact Centre Modern Apprenticeship to recruit new staff.
- 81 per cent of respondents stated that their organisation would benefit from using a Contact Centre Modern Apprenticeship to up-skill existing staff.
- 100 per cent of respondents stated that their organisation would benefit from receiving funding for the Modern Apprenticeship.
- 81 per cent of respondents stated that their organisation would benefit from using a Contact Centre Modern Apprenticeship to reduce skills gaps and shortages.
- 60 per cent of respondents stated that their organisation would consider giving recruitment opportunities to the unemployed.

Additional Consultation in 2013

Following submission to MAG for the Customer Service and Contact Centre Operations Modern Apprenticeships, Skills CFA carried out further consultation with employers and unions.

To facilitate this three main activities took place as follows:

1. Targeted emails sent to Employers and Providers giving a detailed explanation of the proposed CS and MA Frameworks with the request that, those interested, send an email of support to Skills CFA regarding the new MAs.
2. Carried out a telephone survey of 50 Scottish employers.
3. Attended a meeting organised with the STUC involving STUC staff from across the Scottish regions.

1. Targeted emails

Skills CFA sent out 209 emails of which 158 did not respond (despite a second re-send). Of the 51 organisations that sent emails of positive support these are made up from:

- 1 chamber of commerce
- 4 colleges

- 1 health service provider
- 10 private sector employers
- 6 public sector employers
- 25 training providers
- 3 universities

Wherever possible the size, type and location of the organisation are shown, however these were not always available. In addition, where there is one organisation shown several times this is due to different members of the same organisation sending support, particularly when they work at different locations. Full details of the consultation participants are available on request.

2. Telephone Survey

Skills CFA carried out a telephone survey of 50 employer organisations. All organisations completed the survey however, 6 organisations did not want the names of the organisation displayed but still took part in the full survey.

2a. Organisations involved by size

SkillsCFA sought different sizes of organisation on which to base this survey and in terms of the size of the organisations taking part. As illustrated below 60% of these were Micro and Small organisations with a total of 30 organisations of that size taking part:

Employer Actual Numbers	Employer Percentage	Employer Size
10	20%	Micro: 1 to 5 employees
20	40%	Small: 6 to 50 employees
12	24%	Medium: 5 to 149 employees
8	16%	Large: 250+ employees

2b. Organisations involved by Sector

As shown below of those organisations involved 'other services' has been listed by 12 organisations. Following this, overall 'Production/Agriculture and Mining' have the highest number of organisations involved (11) followed by 'Education, Health and public administration' (10). In addition, 6 organisations are involved with 'Finance and Business Services'.

Sectors that organisations are working in:	Numbers of organisations involved in each sector:
Construction	2
Education, Health and public administration	10
Finance Property and Business Services	6
Hospitality/Customer Service	3
Other services	12
Production/Agriculture/Mining	11
Retail	3
Transport and Communication	2
Wholesale/Customer Service	1

2c. Organisations involved by Region

As illustrated below 'Greater Glasgow and the Clyde Valley' and 'Edinburgh & Lothians' represent nearly half (48%) of employers who Skills CFA consulted on.

Regions that organisations are working in:	Numbers of organisations involved in each region:
Greater Glasgow & The Clyde Valley	14
Edinburgh & The Lothians	10
Aberdeen City & Shire	8
The Highlands	3
The Scottish Borders	3
Ayrshire & Arran	2
Dundee & Angus	2
The Kingdom of Fife	2
Argyll & The Isles	1
Dumfries and Galloway	1
Loch Lomond, The Trossachs & Forth Valley	1
Orkney	1
Outer Hebrides	1
Shetland	1

Further information on the consultation and responses are available on request.

Career progression

Job Titles in Customer Service and Contact Centres at Level 2

Following completion of the Modern Apprenticeship at Level 2, candidates should be able to achieve positions in areas, such as Customer Service or Contact Centre Operations:

- Customer Service Assistant
- Customer Service Administrator
- Customer Service Representative
- Customer Service Agent
- Customer Service Officer
- Customer Liaison Assistant
- Customer Service Operator
- Contact Centre Agent
- Trainee Agent
- Help Desk Operative
- Sales Advisor
- Customer Service Advisor
- Outbound Sales Agent
- Inbound Sales Agent
- Telesales Operator
- Telephone Banking Advisor

Progression and the fit with other Frameworks

As the Level 2 Customer Service Modern Apprenticeship involves both customer service and contact centre generic and transferable skills there are numerous avenues through which individuals may progress, as follows:

- onto the Level 3 Modern Apprenticeship in Customer Service (including the Contact Centre Operations pathway)
- into an enhanced job role using the skills developed through the Modern Apprenticeship as the foundations on which to build
- specialisation into Customer Service or Contact Centre job roles and the Customer Service or Contact Centre Modern Apprenticeship pathway at Level 3
- into sector specific job roles which contain elements of transferrable contact centre or customer service skills, potentially including the undertaking of additional sector specific vocational qualifications or Modern Apprenticeships
- into employment in local councils where Customer Service Professional Qualifications are offered that are known as 'Customised Awards' and can be a stepping stone for apprentices who have completed their framework and want to find employment

Appendices

APPENDIX 1

Stakeholder Responsibilities

Many organisations and individuals share the responsibility for ensuring that the Modern Apprenticeship programme is implemented to the highest possible standard. They include:

- Awarding Bodies
- Employers
- Modern Apprentices
- Modern Apprenticeship Group (MAG)
- Sector Skills Councils (SSCs)
- Skills Development Scotland
- Training Providers

Role of the Sector Skills Councils

SSCs are responsible for developing Modern Apprenticeship Frameworks and are required to work with employers in their sectors to ensure that all Frameworks meet the needs of employers in their sectors.

For details on your sector's SSC, follow the link to the Alliance of Sector Skills Councils' website <http://www.sscalliance.org>.

Role of Skills Development Scotland (SDS)

MA frameworks are used by employers as part of their workforce development to train new employees and up-skill existing members of staff. They can be (and often are) used regardless of whether financial support is available from the delivery body who currently provides a 'contribution' towards the cost of delivery. However, only approved MA Frameworks will be eligible for funding support from Skills Development Scotland who should be contacted to establish the availability and level of support for each MA Framework.

Further information is available from: <http://www.skillsdevelopmentscotland.co.uk/our-services/modern-apprenticeships.aspx>

SDS provides advice and guidance to individuals on the range of Modern Apprenticeships and training providers available. Individuals are signposted to opportunity providers who offer training in the vocational areas of interest.

Responsibilities include:

- Supporting the Modern Apprentice with ongoing Career Planning advice
- Signposting candidates to suitable vacancies
- Promoting the Modern Apprenticeship route on the Skills Development Scotland website
- Facilitating recruitment events that bring together jobseekers and opportunity providers

Role of the Awarding Bodies

A significant proportion of the Modern Apprenticeship is based on the assessment of the apprentice against SVQs/ CBQs or SVQ/ CBQ units. These qualifications are accredited by the SQA Accreditation and the Office of the Qualifications and Examinations Regulator (Ofqual) and are offered by Awarding Bodies.

It is the responsibility of the Awarding Bodies to ensure that centres are approved, that assessors and verifiers are suitably qualified, trained and monitored, and that all of the assessment criteria of the SVQs/ CBQs and SVQ/CBQ units are fully met.

Role of the Training Provider

The role of the training provider is important to the success of the Modern Apprenticeship. A training provider can be a further education college, a private or voluntary training company or in some cases the employer themselves or employer partnerships.

Training Providers are responsible for:

- Confirming an appropriate MA programme for candidates
- Agreeing the training needs of the candidates
- Agreeing roles and responsibilities for on the job training
- Agreeing where off the job training will be required and defining roles and responsibilities for this with relevant parties
- Ensuring trainee/candidate has access to the best quality training opportunities available
- Ensuring that the Modern Apprentices and employers fully understand the principles and processes of competence-based assessment
- Registering of MA candidates with the relevant SSC (and Skills Development Scotland if appropriate).
- Compiling and agreeing assessment schedules/assessment plans
- Judging performance evidence
- Completing assessment records
- Reviewing candidates progress at regular intervals
- Submitting records and evidence for moderation
- Advising the Modern Apprentice who to approach for support, advice, encouragement and in case of complaint

Role of Modern Apprenticeship Group (MAG)

MAG is an independent group drawn from key stakeholders involved in the management and delivery of the Apprenticeship programme in Scotland.

MAG is responsible for:

- Approval and re-approval of Modern Apprenticeship Frameworks
- De-approval of Modern Apprenticeship Frameworks
- Encouraging best practice across Modern Apprenticeship Frameworks and sectors

Role of the Employer

Employers' responsibilities include:

- Paying all Modern Apprentices in accordance with company policy and in line with current legislation
- Agreeing roles and responsibilities for on the job training
- Agreeing where off the job training will be required and define roles and responsibilities for this with relevant parties
- Highlighting opportunities for the Modern Apprentice to demonstrate competence
- Meeting with Trainers, Assessors, Verifiers and the Modern Apprentices to review progress
- Witnessing candidate performance and verifying evidence
- Releasing Modern Apprentices for college/off-the-job training in line with training plan
- Ensuring the experience, facilities and training necessary to achieve the outcomes of the training plan.
- Supporting and encouraging Modern Apprentices and rewarding achievement
- Taking responsibility for the Health & Safety of Modern Apprentices.

Role of the Modern Apprentice

Modern Apprentices have the same responsibilities to their employer as any other employee. In addition they have a range of commitments to their training programme.

Modern Apprentices' responsibilities include:

- Observing the company's terms and conditions of employment
- Agreeing a training/development plan with all parties involved
- Undertaking development in line with agreed training plan
- Attending meetings with trainers, assessors and verifiers as required
- Attending college/off-the-job training where required
- Providing evidence of competence
- Developing a collection of evidence (portfolio) and retain ownership of this throughout
- Behaving in a professional manner throughout

APPENDIX 2

Modern Apprenticeship Centres (MACs)

Modern Apprentices may only be registered through organisations approved by the SSC to deliver this Framework. Such approved organisations are called Modern Apprenticeship Centres (MACs)

The MAC may be the employer of the apprentice or a separate organisation such as a training provider, further education college, a private or voluntary training company or in some cases the employer themselves or employer partnerships.

In order to be approved, organisations must make a formal application to the SSC, seeking approval and establishing that the centre satisfies the following criteria:

Either

- 1 be approved by an appropriate Awarding Body as a centre for the assessment of the relevant SVQ/ CBQ (and Core Skills if these are being separately certificated)

or

- 2 be capable of demonstrating a contractual relationship with another approved centre for the assessment of those units for which the MAC does not have approval from an appropriate Awarding Body.

In addition

The SSC will maintain a database of MACs for the delivery of the Framework within Scotland, which will be available to employers and others.

Organisations wishing to become MACs who have yet to obtain the necessary Awarding Body approval for assessment should first contact the Awarding Body direct.

Organisations wishing to be accredited with SQMS (or other appropriate quality system) should contact Skills Development Scotland.

In addition to the assessment of the Modern Apprentice against the relevant standards set by the selected Framework outcomes, the MAC has responsibility for:

- Entering into a formal training agreement with the employer and Modern Apprentice
- Registering Modern Apprentices as candidates for the relevant SVQ/ CBQ (s) and other selected units with the appropriate Awarding Body
- Registering Modern Apprentices with the SSC
- Applying for the final 'Certificate of Completion' on behalf of Modern Apprentices
- Informing the SSC of any material alterations to Modern Apprentices' training plans or desired changes to the selected Framework outcomes.

APPENDIX 4



MODERN APPRENTICESHIP SAMPLE TRAINING AGREEMENT

This Training Agreement is entered into by:

Name of Employer:	
Name of Modern Apprentice:	
Name of Modern Apprenticeship Centre:	

The **Employer’s responsibilities** are to:

- 1 employ the modern apprentice subject to the employer’s usual terms and conditions of employment;
- 2 provide the modern apprentice with the facilities, training and work place opportunities necessary to achieve the selected Framework outcomes specified in the apprentice’s personal training plan;
- 3 pay the modern apprentice an agreed salary which reflects the obligations of the employer and the opportunities for the apprentice;
- 4 in the event of the employer becoming unable to retain the modern apprentice after completion of the apprenticeship, to use reasonable endeavours to secure employment elsewhere;
- 5 in the event of the apprenticeship being terminated prematurely by either the employer or modern apprentice for any reason other than dismissal for unsatisfactory performance or misconduct, to use reasonable endeavours to secure employment and continuation of this apprenticeship elsewhere;
- 6 operate a formal Health and Safety policy and undertake the necessary legal and contractual responsibilities for health and safety of the modern apprentice; and
- 7 operate an Equal Opportunities policy which meets all legal requirements.

The **Modern Apprentice’s responsibilities** are to:

- 1 work for the employer in accordance with the agreed terms and conditions of employment;
- 2 undertake training, attend courses if required, keep records, and take assessments to be determined by the employer and/or Modern Apprenticeship Centre, and carry out such work as may be required in order to achieve the selected Framework outcomes specified in the apprentice’s personal training plan;
- 3 be diligent, punctual, behave in a responsible manner and in accordance with the requirements of Health and Safety legislation relating to the apprentice’s responsibilities as an individual; and
- 4 promote at all times the employer’s best interests.

The **Modern Apprenticeship Centre’s responsibilities** are to:

- 1 agree the content of the modern apprentice’s personal training plan as confirming that the selected Framework outcomes and training plans meet the criteria of this modern apprenticeship
- 2 contract with the employer to provide the training and assessment necessary to enable the modern apprentice to achieve the selected Framework outcomes specified in the apprentice’s personal training plan; and
- 3 use its best endeavours to ensure that the employer provides the modern apprentice with the facilities, training and work place opportunities necessary to achieve the selected Framework outcomes specified in the apprentice’s personal training plan.

This agreement to be signed by all parties:

Employer		Date:
Modern Apprentice <i>(or Parent/Guardian, if under 18)</i>		Date:
Modern Apprenticeship Centre		Date:



MODERN APPRENTICESHIP TRAINING PLAN

The Modern Apprenticeship Centre

Name:
Address:
Telephone:
Contact:

The Modern Apprentice

Full name:
Home address:
Work address:
Date of birth:

The Employer

Name:
Address:
Telephone:
Contact:

Skills Development Scotland office

Name:
Address:
Telephone:
Contact:

Framework selected outcomes

Mandatory outcomes

SVQ/ CBQ Level <i>(please identify level)</i> <i>(List mandatory and optional units)</i>		Tick units being undertaken	SCQF Level	SCQF Credit Points
SVQ/ CBQ level <i>(please identify level)</i> <i>(List mandatory and optional units)</i>				
Enhancements				

Core Skills <i>(Include details of the minimum level required)</i>		Tick units being undertaken	SCQF Level	SCQF Credit Points
1	Communication			
2	Working with others			
3	Numeracy			
4	Information and communication technology			
5	Problem Solving			

Optional outcomes

Additional units <i>(if any)</i> <i>These are optional and should reflect the individual training needs of the Apprentice</i>		Tick units being undertaken	SCQF Level	SCQF Credit Points
	<i>(specify unit)</i>			

Summary of Modern Apprentices accredited prior learning:

If you require assistance in completing this form, please contact:

Skills CFA
Unit 110, Linton House
164-180 Union Street
London
SE1 0LH
info@skillscfa.org
Tel: 020 7091 9620