

Modern Apprenticeships in customer service, retail and travel

Overview

These apprenticeships have been designed to support the development of apprentices working in customer centric roles, offering three pathways in specialist industries:

- Providing Customer Services
- Providing Retail Services
- Providing Travel Services

The goal of this apprenticeship is to develop competence and the range of knowledge, experience and skills required to perform and deliver a high level of customer service within the chosen pathway.

Duration

The Customer Services pathway is expected to take 12 months to complete. The Retail Services pathway is expected to take 12 months to complete. The Travel Services pathway is expected to take 18 months to complete.

Level

SCQF Level 5. More information on SCQF can be found [here](#).

Qualification achieved

Apprentices will achieve **one** of the following qualifications:

- Diploma in Providing Customer Services at SCQF Level 5 (GV5Y 45)
- Diploma in Providing Retail Services at SCQF Level 5 (GV65 45)
- Diploma in Providing Travel Services at SCQF Level 5 (GV67 45)

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Apprenticeships aim to provide mixture of on-the-job (in the workplace) and off-the-job (through day or block release) learning to enable people to develop the knowledge, skills and expertise required by businesses today.

Designed by employers to attract new talent, tackle critical skills shortages and develop existing workforces, apprenticeships can both help people to enter the world of work and develop the skills of those already in work.

About Scottish Apprenticeships

Scottish Apprenticeships are for everyone and reflect the Government's commitment to promoting a world-class, inclusive, work-based learning system. They are administered by **Skills Development Scotland**, the National Skills Agency. Skills Development Scotland has a remit to contribute to the nation's economic growth and it does this by supporting individuals and businesses alike to develop and apply their skills in the workplace.

The Scottish Apprenticeship system focuses on three specific key elements:

- the **learning outcomes** aligned to the specific work situations of an apprentice's job;
- the **knowledge, skills and behaviours** that will be developed by apprentices, enabling them to work competently and confidently; and
- the **meta-skills** that will be developed by apprentices to help them to manage themselves, collaborate with others and interact with change.

Throughout their apprenticeship, apprentices will be supported and guided by their employer, mentor and learning provider, and will have their growing competence measured by an assessor to ensure they can perform their job to the standard required. On successful completion, apprentices will be awarded nationally recognised competence-based and/or professional qualifications in their chosen field.

About this standard and framework document

Working in partnership with businesses and stakeholders, this standard and framework document has been written to provide apprentices and employers with an overview of the key features of this apprenticeship. Please read this alongside the [Customer Service](#), [Retail](#) and [Travel Occupation](#) Profiles at SCQF Level 5.

Find further information on apprenticeships [here!](#)



This apprenticeship is designed to support entry level customer centric roles across different sectors and contains three incorporated specialist pathways for Customer Service, Retail and Travel.

Each pathway will provide apprentices with the skills and knowledge required to become competent in their chosen job role and includes a balance of technical, business and interpersonal skills areas, designed to ensure apprentices have an appropriate set of skills to operate in today's customer focused job roles.



**Customer
Service**



Retail



Travel



Click on the apprenticeship to find out more!



Providing customer services: role of the apprentice



Role of the apprentice

This apprenticeship has been designed for use to support customer service roles across a wide range of businesses which might include small, medium and large enterprises like contact centres, venues, surgeries and other customer centric roles.

There are a number of customer service roles at this level, such as call centre agent, customer service advisor, receptionist, sales advisor.

All of these roles require apprentices to:

- Develop their meta-skills
- Provide effective customer service
- Work as part of a team

To ensure relevance and usability of these apprenticeships across a wider range of customer service environments, there are multiple optional learning outcomes which can be selected to meet the apprentice's job role. These optional learning outcomes are dependent on job role and include, but are not limited to:

- Providing customer focused information and advice
- Creating and maintaining customer records
- Processing customer feedback
- Promoting services and products
- Developing customer relationships
- Planning and monitoring own workload

For the full list of mandatory and optional learning outcomes see the [Customer Service](#) Occupation Profile at SCQF Level 5.



Providing retail services: role of the apprentice



Role of the apprentice

This apprenticeship has been designed for use to support retail roles across a wide range of businesses which might include small, medium and large enterprises like supermarkets, fashion retailers, car dealerships, pharmacies speciality stores and other customer centric roles.

There are a number of retail roles at this level, such as retail assistant, customer assistant and sales advisor.

All of these roles require apprentices to:

- Develop their meta-skills
- Provide effective customer service
- Work as part of a team
- Follow health and safety procedures

To ensure relevance and usability of these apprenticeships across a wider range of retail environments, there are multiple optional learning outcomes which can be selected to meet the apprentice's job role.

These optional learning outcomes are dependent on job role and include, but are not limited to:

- Helping customers find and choose products
- Maintaining stock effectively
- Selling products and services
- Processing payments
- Setting up promotional displays

For the full list of mandatory and optional learning outcomes see the [Retail](#) Occupation Profile at SCQF Level 5.



Providing travel services: role of the apprentice



Role of the apprentice

This apprenticeship has been designed for use to support travel roles across a wide range of businesses which might include small, medium and large enterprises focusing on personal, corporate or leisure travel such as high street travel agents, online travel agents and contact centres.

There are a number of roles at this level, such as travel advisor and travel consultant.

All of these roles require apprentices to:

- Develop their meta-skills
- Provide effective customer service
- Process travel bookings
- Follow health and safety procedures

To ensure relevance and usability of these apprenticeships across a wider range of travel environments, there are multiple optional learning outcomes which can be selected to meet the apprentice's job role.

These optional learning outcomes are dependent on job role and include, but are not limited to:

- Researching travel destinations and products
- Selling travel-related products and services
- Providing customer focused information and advice
- Creating and maintaining customer records
- Developing customer relationships

For the full list of mandatory and optional learning outcomes see the [Travel](#) Occupation Profile at SCQF Level 5.





Knowledge, skills and behaviours

This apprenticeship is designed to develop apprentices' careers by developing their knowledge and understanding of their role, increasing their skills and enhancing their behaviours.

Employers from the relevant sectors have helped to identify the key knowledge, skills and behaviours for apprentices working in customer centric roles at this level. Throughout their apprenticeship, apprentices should be regularly assessed to ensure they can demonstrate both know-how and ability in each of these.

A full list of the specific knowledge, skills and behaviours for each pathway can be found in the Occupation Profiles for [Customer Service](#), [Retail](#) and [Travel](#) at SCQF Level 5.



Skills and Knowledge

- Using a range of communication skills to actively listen and respond to colleagues and customers effectively
- Communicating appropriately, including written, digitally and face to face in line with your organisation's expectations
- Selecting and applying techniques relevant to your role to successfully complete tasks and duties
- Working well as part of a team and on your own
- Understanding who your customers are and how to adapt your style to different customers
- Understanding your organisation and their purpose and values
- Knowing the appropriate legislation and regulatory requirements that affect your organisation
- Knowing your organisations products and services



Behaviours

- Taking ownership for keeping your organisational knowledge up to date
- Adapting to change
- Operating effectively within teams
- Seeking and acting on feedback from others to develop or maintain skills and knowledge



Role of the apprentice

Meta-skills sit alongside and complement technical knowledge, skills and behaviours. As technology, society and the way we work change at an ever-increasing pace, meta-skills are the over-arching and future-focused attributes that enable other skills to be developed through consideration, reflection and implementation.

Meta-skills support improved performance and productivity, greater adaptability and resilience to change. For apprentices, meta-skills are a critical asset, supporting their ability to cope and excel in the face of change, to solve problems, to collaborate with others and to create successful futures. There are three categories, each with four meta-skills.

Managing yourself - focus, integrity, adaptability and initiative

Connecting with others - communication, feeling, collaboration and leadership

Interacting with change - curiosity, creativity, sense-making and critical thinking.



Developing meta-skills in Customer Service, Retail and Travel Apprenticeships

Supported by their employer, mentor and learning provider, apprentices should consider, practice and reflect on their use of meta-skills during their apprenticeship, building those skills to enhance their personal effectiveness in their present role and

Here are some examples of when an apprentice might use Meta-skills:



Managing yourself

A clear **focus** is required when dealing with a query from a customer; **integrity** is essential to work effectively with colleagues by being honest about an issue to find a solution; **adaptability** is key to being able to be flexible when there is an unexpected change; and using **initiative** is critical to professional development through looking for the next step or stage if a task has been completed.



Connecting with others

Clear and effective **communication** with colleagues and customers is one of the most significant aspects roles in these industries; **feeling** and resilience is needed to show empathy and understanding when dealing with customers and colleagues; skills in **collaboration** are vital to career development as responding constructively to feedback can impact overall individual and team performance; and strong **leadership** qualities are required when working on your own without supervision.



Interacting with change

A keen sense of **curiosity** is a critical asset when beginning a new or unfamiliar task because asking questions will help you to understand what you are doing and why; **creativity** is fundamental to seeking a solution to a customer's problems or requests by sometimes thinking outside the box; **sense-making** comes into play when using a new or unfamiliar booking, payment or information management system; and **critical thinking** is key during professional appraisal and performance management.

Key roles and responsibilities



A number of different parties will be involved in the delivery, management and assessment of a successful apprenticeship. As well as the apprentice, key roles include employer, mentor, learning provider and assessor. Each has a specific set of responsibilities during the apprenticeship.

Apprentice Responsibilities

In their day-to-day roles, apprentices have the same responsibilities to their employer as any other employee but they have additional and specific responsibilities for their own learning and development too.

- Agreeing a learning/ development plan with all parties involved and following it through
- Committing to learning throughout the duration of apprenticeship
- Participating in progress meetings with employer and learning provider representatives
- Participating in off-the-job learning where required
- Reflecting on performance and on development of skills, knowledge and behaviours required of the role
- Agreeing new goals to progress learning with all parties involved

Employer Responsibilities

- Providing apprentices with a contract of employment, a job description and an induction Programme
- Paying apprentices in line with company policy, current legislation, fair work principles, and equality and diversity expectations
- Ensuring a working environment that is free from discrimination, bullying and harassment

- Agreeing learning needs and a learning and development plan with the learning provider and apprentices including
 - agreeing when off-the-job learning will be required and releasing apprentices for this as required
 - making on-the-job learning arrangements
 - identifying additional support requirements and agreeing actions to implement these
- Providing a quality work-based learning environment for apprentices, including the facilities and training necessary to demonstrate competence and succeed in the apprenticeship
- Providing the support of a mentor, who has relevant industry experience and is familiar with the employer's business, to support apprentices' development
- Contributing to the ongoing assessment of occupational competence, including observing performance, verifying evidence and profiling meta-skills
- Meeting with apprentices and learning providers to review apprentices' progress and set future goals
- Providing an environment that supports apprentices to take responsibility for their own learning and development
- Supporting and encouraging apprentices during their apprenticeship
- Recognising the achievements of apprentices in career management and progression
- Providing constructive feedback to the learning provider on the quality of their service delivery to inform continuous improvement of both the Scottish Apprenticeships system and apprentices themselves

Key roles and responsibilities



Mentor Responsibilities

In their day-to-day roles, apprentices have the same responsibilities to their employer as any other employee but they have additional and specific responsibilities for their own learning and development too.

- Helping new apprentices orientate into the workplace
- Providing information, advice and guidance relating to the learning and assessment aspects of the apprenticeship
- Supporting apprentices to define meta-skills in their shared work context
- Working with apprentices, employers and learning providers to ensure problems are resolved quickly
- Acting as an expert witness for apprentices
- Providing support to apprentices as they adjust to the workplace and progress in their career

Employer Responsibilities

- Providing an appropriate apprenticeship programme for apprentices and employers
- Agreeing the learning needs of the apprentices with both the apprentice and the employer
- Agreeing when off-the-job learning will be required and defining roles and responsibilities for this with relevant parties
- Ensuring apprentices have access to the best quality learning opportunities available
- Ensuring apprentices and employers fully understand the principles and processes of competence-based assessment
- Registering apprentices through MA Online and with relevant awarding bodies, sector skills organisations and Skills Development Scotland as appropriate

- Compiling and agreeing learning and development plans and assessment plans with apprentices and employers
- Completing assessment records and submitting records and evidence for verification/moderation
- Reviewing apprentices' progress at regular intervals with the employer
- Supporting apprentices to develop their reflective practice
- Advising apprentices who to approach for support, advice and encouragement both within and outwith the workplace
- Seeking and providing feedback from and to employers and apprentices to inform continuous improvement of the Scottish Apprenticeships system and apprentices themselves

Assessor Responsibilities

- Meeting with apprentices, mentors and employers to plan learning and review progress
- Monitoring apprentices' progress against learning and development plans
- Observing and assessing apprentices in the workplace and judging whether their work meets the competence requirements set by the qualification awarding body
- Assessing different types of evidence from apprentices
- Providing constructive feedback on performance and offering suggestions for improvement
- Maintaining current knowledge of industry standards and seeking innovative new methods of work-based learning delivery

Before the apprenticeship starts



The recruitment of apprentices is primarily the responsibility of the employer and, before an apprenticeship starts, consideration should be given to entry requirements and also to ensuring that the workplace adheres to fair work, inclusion and diversity principles.

There are no formal entry requirements; however, apprentices must be employed in a suitable job role to gain the skills, knowledge and experience required to achieve the Modern Apprenticeship in Customer Service, Retail and Travel and the associated SCQF Level 5 qualification. In addition, apprentices should:

- Be enthusiastic about the industry and sector
- Be committed to professional development with a growth mindset
- Be resilient, proactive and prepared to work independently
- Contribute to a team or organisational goals and performance
- Be prepared to act as a role model for others
- Be prepared to adapt and be flexible to meet the needs and requirements of the role and organisation
- Be prepared to attend off-the-job training or during allocated skills development time
- Be prepared to acquire the broad range of skills, knowledge and understanding required in the apprenticeship

Employers can also consider existing workplace skills and experiences, where apprentices are either changing careers or upskilling. Being open to alternative assessment methods and relevant experience, instead of qualifications, can help to broaden the pool of potential applicants.



Recognition of Prior Learning

Individuals applying for an apprenticeship will undergo selection based on the employer's existing HR processes. Learning providers should take account of this and liaise with employers to provide advice and guidance on any RPL and experience that will be accepted for entry onto the programme.

It is recommended that a flexible approach to RPL is adopted, on a case-by-case basis, with all relevant experience as well as any previous qualifications considered. Learning providers should always consider how they can best recognise apprentices' prior learning to minimise repetition of content. You can find more information on RPL [here](#).



Apprenticeship agreement and employment status

All post-school apprentices must hold a contract of employment for the period of the apprenticeship. In addition, an apprenticeship agreement, confirming the commitment of the employer, the apprentice and the learning provider to the agreed apprenticeship must be signed by all parties. This agreement forms part of the individual employment arrangements between the apprentice and the employer; and of the learning arrangements between the learning provider, the employer and the apprentice.



Registration and certification

Registration and certification of apprenticeships is undertaken through [Modern Apprenticeship Online](#). It is the responsibility of the learning provider to ensure that the registration of apprentices is completed within four weeks of the start of their apprenticeship.

Before the apprenticeship starts



Fair work and inclusion

The Scottish Apprenticeships system aims to embed fair work principles. Fair Work First is the Scottish Government's flagship policy for driving high quality and fair work across the labour market in Scotland by applying fair work criteria to grants, other funding and contracts being awarded by and across the public sector, where it is relevant to do so. Through this approach the Scottish Government is asking employers to adopt fair working practices, specifically:

- appropriate channels for effective voice, such as trade union recognition;
- investment in workforce development;
- no inappropriate use of zero hours contracts;
- action to tackle the gender pay gap and create a more diverse and inclusive workplace; and
- payment of at least the minimum Living Wage.

Further guidance on Fair Work First is available from [here](#).

The design and development of Scottish Apprenticeships aims to embed these principles in practical ways by including opportunities for feedback from apprentices as well as the availability of clear pathways into future opportunities beyond the apprenticeship itself.

Protected characteristics

The Equality Act 2010 includes nine protected characteristics, which are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, and sex and sexual orientation. It is against the law to discriminate based on these protected characteristics. Skills Development Scotland is a Corporate Parent and, to that end, includes 'care experienced' in a similar way to protected characteristics in all its funded programmes and services.


Attracting the best people into apprenticeships involves ensuring that barriers are removed. Receiving the right support at the right time unlocks the potential of people who could otherwise be denied the opportunity to go on and become valued employees. Supporting people to feel confident about disclosing their protected characteristics in a safe and respectful way allows employers and learning providers to put the right conditions in place to unlock that potential; the right time for this is often at the start of an apprenticeship or even at the recruitment stage. In practice, it might involve ensuring that reasonable adjustments are made to accommodate apprentices, where that is possible and to help them make the most of their apprenticeship journey. Examples might include (but are not limited to) supporting people with sensory impairments, supporting people for whom English is not their first language and supporting people who are care experienced (for example, through fostering, adoption or residential care).


Before the apprenticeship starts




Fair work, inclusion and diversity


Customer Service


 Slightly higher female representation.


 Consistently higher disability disclosure rate


 Frequently higher for apprentices from BME communities


Retail

 Consistently higher female representation.


 Consistently higher disability disclosure rate


 Higher for apprentices from BME communities


 Lower care experience disclosure rate


 Higher representation of those from areas of high deprivation than low deprivation, this is reflective of all MA's nationally.

Travel

 Consistently higher female representation.

 Consistently lower disability disclosure rate

 Higher for apprentices from BME communities

 Higher care experience disclosure rate

Compared to national MA disclosure rates over a 5 year pattern from 2016/2017 to 2022/2023



Once the apprenticeship starts, there are a number of key considerations, tasks and milestones that apprentices, employers, learning providers, mentors and assessors should undertake to optimise a successful outcome for all parties.

Work-based Learning

Work-based learning – aligned to and assessed against both the **learning outcomes** and the **knowledge, skills and behaviours** of the apprenticeship – is the central and most significant component of an apprenticeship and is based on apprentices' real-life experiences in the workplace. Work-based learning is a partnership between apprentice, employer and learning provider and all apprentices must have the support of a mentor in the workplace. Get more information on work-based learning [here](#).

Meta-skills Development

This apprenticeship includes a learning outcome that provides opportunities to develop meta-skills. To effectively develop the meta-skills outlined earlier, apprentices must first understand what they are and how they might apply them in their role. To help with this, a simple exercise to define what meta-skills mean in their role (in language that both apprentice and employer are comfortable with) should be used. This will allow apprentices to consider their own meta-skills profile and which meta-skills they might need to develop or apply in order to perform effectively at work. Setting development goals, action planning and regularly reflecting on progress will help apprentices to develop their meta-skills and it is vital to provide the time and space for reflections to take place. Naturally occurring opportunities to discuss and reflect on meta-skills might include inductions or performance management, career development and performance review sessions.

Delivery of Training

The majority of training undertaken in any apprenticeship is focused on skills developed in the workplace. However, in some apprenticeships there is a requirement for elements of structured formal taught learning/training to be delivered outside the normal workplace, for example, in a college or training centre which might include classroom and or development of skills in a workshop/realistic work environment. We often describe this as “off-the-job” training. The way this is delivered is an individual negotiation between the learning provider and the employer. On the job training should:

- Achieve clear and specific outcomes which contribute directly to the successful achievement of the MA framework and this may include accredited and non-accredited elements.
- Be planned, reviewed and evaluated jointly between the modern apprentice and a tutor, mentor or manager.
- Allow access as and when required by the modern apprentice either to a tutor, mentor or manager.
- Be delivered during contracted working hours.
- Be delivered through two or more the following methods: individual and group teaching, e-learning, distance learning, coaching, mentoring, feedback and assessment, collaborative/network learning with peers, guided study.

An initial assessment and learning plan should be developed at the outset with input from the apprentice, employer and the learning provider, to identify any additional needs and provide apprentices with the appropriate support or adaptations required to successfully complete their apprenticeship.



Quality assurance

Skills Development Scotland is responsible for making sure all funded learning is of high quality and benefits the apprentice. A quality assurance framework is in place to cover the delivery of work-based learning in an apprenticeship and is designed to demonstrate how effectively learning providers and employers support this by ensuring apprentices:

- Receive appropriate support and guidance to enable them to become successful apprentices and confident individuals;
- Receive quality learning and develop their skills to achieve their learning goals;
- Are treated with dignity and respect in a way that promotes equality and inclusion; and
- Work towards successful outcomes, leading to future employment or further appropriate career progression.

The relevant awarding and accreditation bodies will undertake the quality assurance of the assessment of competence-based and professional qualifications.



Approaches to Assessment

Assessment is generally carried out in the apprentice's place of work but where this is not possible assessment can be carried out in a training environment, but the situation should reflect a real work environment as far as possible. For further details refer to the relevant section of the Specific Assessment Strategy Appendix for Service for competence-based qualifications. Regular reviews should take place with the apprentice as well as their employer/mentor/supervisor (whichever is appropriate) to discuss progress. Apprentices keep a record of activities carried out in the workplace using work logs and task sheets.

Observation, questioning and examination of product evidence

This three-method approach classifies all assessments under observation, questioning and examination of product evidence. It is therefore based on the development of a portfolio of work and regular reflection on learning and skills development through professional dialogue between apprentices and mentors, employers and learning providers. The following approaches to assessment were identified by employers in the relevant sectors as being the most appropriate and operationally useful at this level:

- Observation
- Evidence of prior achievement
- Questioning
- Personal statements and reflective accounts
- Presentations
- Product evidence
- Witness testimonies
- Professional discussion

Holistic Assessment

The holistic approach allows larger pieces of work to evidence a number of learning outcomes, rather than a piecemeal process of finding separate evidence for each outcome and/or its associated knowledge, skills and behaviours. Work-based projects or problem-based activities often provide the richest opportunities for holistic assessment.



Qualification Requirements

Qualification Requirements

During their apprenticeship, apprentices must complete the relevant competence-based qualification.

- For the Providing Customer Services pathway, apprentices must complete the Diploma in Providing Customer Services at SCQF Level 5 (GV5Y 45)
- For the Providing Retail Services pathway, apprentices must complete the Diploma in Providing Retail Services at SCQF Level 5 (GV65 45)
- For the Providing Travel Services pathway, apprentices must complete the Diploma in Providing Travel Services at SCQF Level 5 (GV67 45).

These qualifications bring together the development and assessment of all the learning outcomes and knowledge, skills and behaviours required of the role in single qualification. They include meta-skills development and assessment, which are integrated with technical skills.

Other awards, qualifications or training programmes

In addition to achieving the relevant qualification above, **apprentices undertaking the retail pathway**, who deal with the sale of alcohol must complete the following award:

- Scottish Certificate for Safe Sale and Service of Alcohol at SCQF Level 5 (for those dealing with the sale of alcohol).



Core Skills

Core Skills are broad transferable skills, which can be used in addition to meta-skills, to help apprentices learn how to manage and adapt how they respond to a changing society.

The five Core Skills are: Communication, Numeracy, Information and Communication Technology, Problem Solving and Working with Others.

Core Skills at SCQF Level 4 are embedded within this Framework therefore no separate certification is necessary.



Pathways and progression

A successfully completed apprenticeship, including the achievement of competence-based and professional qualifications, opens the door to a number of opportunities for progression in both work and further learning.

Successful apprentices may progress to:

- Higher level role in same (or related) discipline
- Similar level job in customer focused roles across various industries
- Further study at FE/HE
- Modern Apprenticeships in Customer Service, Retail and Travel at SCQF Level 6



