

## UNIT 218 (LEVEL 2 UNIT, 4 CREDITS)

**MAINTAIN CUSTOMER SERVICE THROUGH EFFECTIVE HANDOVER**

## Elements in this unit

When you have completed this unit, you will have proved that you:

- 218.1** can agree joint responsibilities in a customer service team
- 218.2** can check that customer service actions are seen through by working together with colleagues
- 218.3** understand how to maintain customer service through effective handover.

## You should note

- 1** Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)
- 2** You may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3** You must provide evidence that shows you have done this over a sufficient period of time, with different customers on different occasions, for your assessor to be confident that you are competent.
- 4** You do not need to be more senior than your colleague or be their supervisor to pass on responsibility to them for customer service actions or to check completion.

## Assessed evidence

You need to show that you understand and are able to complete all the elements in this unit over a sufficient period of time, with different customers, on different occasions. Evidence may be gained through direct observation or products of work, recorded by your assessor and then referenced in the box below. On the next pages, these evidence references can be written in the relevant boxes of 'What you must cover', 'What you must do' and 'What you must know'.

Evidence reference	Evidence title	Assessment method

### Assessment method key

**O** Observation **Q** Questioning **PE** Product Evidence  
**WT** Witness Testimony **PD** Professional Discussion

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## What you must cover

Evidence reference should be entered in the shaded areas below. You must cover **all** the points listed.

**1 You must provide evidence of maintaining customer service through effective handover:**

a during routine delivery of customer service

b during a busy time in your job

c during a quiet time in your job

d when people, systems or resources have let you down.

## What you must do

Evidence reference should be entered in the shaded areas below. You must do **all** the points listed.

### 218.1 To agree joint responsibilities in a customer service team, you must:

218.1.1 identify services or products you are involved in delivering that rely on effective teamwork

218.1.2 identify steps in the customer service delivery process that rely on exchange of information between you and your colleagues

218.1.3 agree with colleagues when it is right to pass responsibility for completing a customer service action to another

218.1.4 agree with colleagues on how information should be exchanged between you to enable another to complete a customer service action

218.1.5 identify ways of reminding yourself when you have passed responsibility to a colleague for completing a customer service action.

### 218.2 To check that customer service actions are seen through by working together with colleagues, you must:

218.2.1 access reminders to identify when to check that a customer service action has been completed

218.2.2 ensure that you are aware of all details of customer service actions your colleague was due to complete

218.2.3 ask your colleague about the outcome of them completing the customer service action as agreed

218.2.4 identify the next customer service actions if your colleagues have been unable to complete the actions they had previously agreed

218.2.5 work with colleagues to review the way in which customer service actions are shared.

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## What you must know

Evidence reference should be entered in the shaded areas below. You must know **all** the points listed.

**218.3 To understand how to maintain customer service through effective handover, you must be able to:**

218.3.1 explain your organisation's customer service procedures for the services or products you are involved in delivering

218.3.2 identify the appropriate colleagues to pass responsibility to for completing particular customer service actions

218.3.3 describe ways of ensuring that information is passed between you and your colleagues effectively

218.3.4 identify ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague

218.3.5 explain the importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting

218.3.6 identify opportunities for contributing to review the way customer service actions are shared in customer service processes.

## Unit sign-off

The evidence for this unit is valid, sufficient and an authentic record of the candidate's current competence and has been assessed under the requirements of the assessment strategy.

I confirm that the evidence provided is a result of my own work.

Signature of candidate	Date
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I confirm that the candidate has demonstrated competence by satisfying all of the criteria for this unit.

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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