

Unit 214

Carry out customer service handovers

UAN:	T/506/2157
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to the Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none">• CFACSB16 Deliver seamless customer service with a team
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to carry out customer service handovers. Upon completion of this unit, learners will be able to plan and carry out customer service handovers.

Learning outcome

The learner will:

1. understand the customer service handover process

Assessment criteria

The learner can:

- 1.1 explain an organisation's customer service **handover** procedures
- 1.2 explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues
- 1.3 explain why, when and how to set reminders to follow up on actions handed over to others
- 1.4 explain levels of their own responsibility in the customer service handover process.

Assessment guidance

Handover:

The process of transfer without loss of service to the customer.

Evidence may be supplied by:

- professional discussion
- questioning
- reflective account
- organisational policies and procedures*

Learning outcome
The learner will: 2. be able to plan customer service handovers
Assessment criteria
The learner can: 2.1 identify the steps in the customer service delivery process that rely on exchanges of information among team members 2.2 agree with colleagues when to pass customer service issues from one person to another 2.3 agree methods of information exchange .

Assessment guidance
Methods of information exchange: <ul style="list-style-type: none"> • formal (in writing) written messages, emails, report • informal (verbal) telephone, face to face, text
Evidence may be supplied by: <ul style="list-style-type: none"> • observation • witness testimony • customer records* • professional discussion • questioning • reflective account • service offer* • documentation* • legislative requirements and organisational policies and procedures*

Learning outcome
The learner will: 3. be able to carry out customer service handovers
Assessment criteria
The learner can: 3.1 explain to customers to whom and why a handover is being made 3.2 exchange information with colleagues in line with organisational procedures 3.3 check that actions required by others following handovers have been completed 3.4 identify further actions when the activities required by others have not been completed 3.5 share feedback with colleagues to make improvements to handover processes.

Assessment guidance

Organisational procedures:

- roles and responsibilities covering limits of authority
- communication policy

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- documentation*
- legislative requirements and organisational policies and procedures*

Note: this unit is about the candidate carrying out customer service handovers. Here the candidate will require to take action, to exchange information and ensure a smooth handover for customers to others. This is required to be carried out on more than one occasion. Witness testimonies can be added if necessary.

* While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.