

UNIT 275 (LEVEL 2 UNIT, 4 CREDITS)

## **MAINTAIN CUSTOMER SERVICE THROUGH EFFECTIVE HANDOVER**

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Customer service delivery in a team involves many situations when you may be unable to see actions through and have to pass on responsibility to a colleague. This sharing of responsibility should be organised and follow a recognised pattern.

This unit has **three** learning outcomes:

1. Agree joint responsibilities in a customer service team
2. Check that customer service actions are seen through by working together with colleagues
3. Understand how to maintain customer service through effective handover.

## UNIT 275 (2GEN8)

**MAINTAIN CUSTOMER SERVICE THROUGH EFFECTIVE HANDOVER**

## Evidence

This space is to record your evidence for this unit. The criteria that you should be able to record are within the learning outcomes.

No	Method	Summary of evidence, or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which must include observation of your performance.

### (OUTCOME 1)

Circled numbers  
must be observed

- |   | 1                                | 2                                | 3                                | 4                                |
|---|----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| 1 Identify services or products you are involved in delivering that rely on effective teamwork                                      | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
| 2 Identify steps in the customer service delivery process that rely on exchange of information between you and your colleagues      | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
| 3 Agree with colleagues when it is right to pass responsibility for completing a customer service action to another                 | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
| 4 Agree with colleagues on how information should be exchanged between them to enable another to complete a customer service action | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
| 5 Identify ways of reminding yourself when they have passed responsibility to a colleague for completing a customer service action. | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |

### (OUTCOME 2)

Circled numbers  
must be observed

- |  | 1                                | 2                                | 3                                | 4                                |
|--|----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| 6 Access reminders to identify when to check that a customer service action has been completed                                 | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
| 7 Ensure that you are aware of all details of customer service actions colleagues are due to complete                          | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
| 8 Ask colleagues about the outcome of completing the customer service action as agreed   | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
| 9 Identify the next customer service actions if colleagues have been unable to complete the actions they had previously agreed | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
| 10 Work with colleagues to review the way in which customer service actions are shared.  | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |

## UNIT 275 (2GEN8)

# MAINTAIN CUSTOMER SERVICE THROUGH EFFECTIVE HANDOVER

## What you must cover

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.

1 2 3 4

### Customer service

You must provide evidence of maintaining customer service through effective handover during each of the following:

- |   |   |                          |                          |                          |                          |
|---|---|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 | during routine delivery of customer service         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | during a busy time in your job                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | during a quiet time in your job                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | when people, systems or resources have let you down | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information

### (OUTCOME 3)

To understand how to maintain customer service through effective handover you need to:

- K1** Explain organisation's customer service procedures for the services or products you are involved in delivering
- K2** Identify the appropriate colleagues to pass responsibility to for completing particular customer service actions
- K3** Describe ways of ensuring that information is passed between you and your colleagues effectively
- K4** Identify ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague
- K5** Explain the importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting
- K6** Identify opportunities for contributing to review the way customer service actions are shared in customer service processes.

