

CFACSB8 (SQA Unit Code – H9Y3 04) Maintain customer service through effective handover



Overview

This Standard is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Customer service delivery in a team involves many situations when you are unable to see actions through and you pass on responsibility to a colleague. This sharing of responsibility should be organised and follow a recognised pattern. Most of all you need to be sure that, when responsibility is passed on, the actions are seen through. This involves routinely checking with your colleagues that customer service actions have been completed. This Standard is for you if your job involves service delivery as part of a team and you regularly pass on responsibility for completion of a customer service action to a colleague.

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Performance criteria

Agree joint responsibilities in a customer service team

You must be able to:

- P1 identify services or products you are involved in delivering that rely on effective teamwork
- P2 identify steps in the customer service delivery process that rely on exchange of information between you and your colleagues
- P3 agree with colleagues when it is right to pass responsibility for completing a customer service action to another
- P4 agree with colleagues how information should be exchanged between you to enable another to complete a customer service action
- P5 identify ways of reminding yourself when you have passed responsibility to a colleague for completing a customer service action

Check that customer service actions are seen through by working together with colleagues

You must be able to:

- P6 access reminders to identify when to check that a customer service action has been completed
- P7 ensure that you are aware of all details of customer service actions your colleague was due to complete
- P8 ask your colleague about the outcome of their completing the customer service action as agreed
- P9 identify the next customer service actions if your colleagues has been unable to complete the actions you had previously agreed
- P10 work with colleagues to review the way in which customer service actions are shared

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Knowledge and understanding

You need to know and understand:

- K1 your organisation's customer service procedures for the services or products you are involved in delivering
- K2 the appropriate colleagues to pass responsibility to for completing particular customer service actions
- K3 ways of ensuring that information is passed between you and your colleagues effectively
- K4 organisational procedures and acceptable communication media and platforms for passing information to colleagues
- K5 ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague
- K6 the importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting
- K7 opportunities for contributing to review the way customer service actions are shared in customer service processes

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SQA Evidence Requirements to Support this Unit

This Unit is designed to assess the skills and knowledge of candidates in the workplace. Candidate evidence should be generated under workplace conditions (**either paid or voluntary**) and evidence must be generated with different customers on different occasions over a sufficient period of time.

Observation should be the primary and preferred source of evidence of competent performance wherever possible. Observation of candidate performance will be supported by other methods of assessment which may include:

- ◆ witness testimony
- ◆ questioning
- ◆ candidate statement
- ◆ professional discussion
- ◆ product and photographic evidence,
- ◆ relevant active documentation, reports, presentations and
- ◆ other valid evidence which relates directly to learner performance under workplace conditions

A combination of performance and knowledge evidence is required to enable the assessor to confirm that the learner is competent.

Simulation should only be used in exceptional circumstances and it should only be for small parts of the Unit. Simulated assessments **must** be undertaken in a realistic working environment (RWE). A RWE is 'an environment which replicates the key characteristics in which the skill to be assessed is normally employed'. The RWE must provide conditions that are the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in the Assessment Strategy for Customer Service SVQs at link: <http://www.sqa.org.uk/sqa/16732.html>

SQA's Guide to Assessment is designed to provide support for everyone who assesses for SQA qualifications. It looks at the principles of assessment, and brings together information on assessment in general as well as on best practice in assessment. The Guide to Assessment can be downloaded free from SQA's website www.sqa.org.uk

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