

F944 04 (CFACSB8) Maintain Customer Service Through Effective Handover

This Unit has the following Elements:

- B8.1 Agree joint responsibilities in a customer service team.
- B8.2 Check that customer service actions are seen through by working together with colleagues.

Unit Summary

This Unit 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 Unit 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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B8.1 Agree joint responsibilities in a customer service team

Performance Criteria

You must consistently:

- B8.1.1 Identify services or products you are involved in delivering that rely on effective teamwork.
- B8.1.2 Identify steps in the customer service delivery process that rely on exchange of information between you and your colleagues.
- B8.1.3 Agree with colleagues when it is right to pass responsibility for completing a customer service action to another.
- B8.1.4 Agree with colleagues how information should be exchanged between you to enable another to complete a customer service action.
- B8.1.5 Identify ways of reminding yourself when you have passed responsibility to a colleague for completing a customer service action.

B8.2 Check that customer service actions are seen through by working together with colleagues

Performance Criteria

You must consistently:

- B8.2.1 Access reminders to identify when to check that a customer service action has been completed.
- B8.2.2 Ensure that you are aware of all details of customer service actions your colleague was due to complete.
- B8.2.3 Ask your colleague about the outcome of their completing the customer service action as agreed.
- B8.2.4 Identify the next customer service actions if your colleagues has been unable to complete the actions you had previously agreed.
- B8.2.5 Work with colleagues to review the way in which customer service actions are shared.

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Knowledge and Understanding for the whole Unit

To be competent at maintaining customer service through effective handover you must know and understand:

- B8a Your organisation's customer service procedures for the services or products you are involved in delivering.
- B8b The appropriate colleagues to pass responsibility to for completing particular customer service actions.
- B8c Ways of ensuring that information is passed between you and your colleagues effectively.
- B8d Ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague.
- B8e The importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting.
- B8f Opportunities for contributing to review the way customer service actions are shared in customer service processes.

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Evidence Requirements

- 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 — July 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 must provide evidence of maintaining customer service through effective hand over:
 - 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.
- 5 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 check completion.

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Notes/Comments

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

Candidate's signature _____ **Date** _____

Assessor's signature _____ **Date** _____

Internal verifier's signature _____ **Date** _____