

Unit PPL2GEN11 (HL2J 04) Maintain Customer Service Through Effective Handover

I confirm that the evidence detailed in this unit is my own work.

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| **Candidate’s name** |  | **Candidate’s signature** |  | **Date** |
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I confirm that the candidate has achieved all the requirements of this unit.

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| **Assessor’s name** |  | **Assessor’s signature** |  | **Date** |
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| **Countersigning — Assessor’s name**  **(if applicable)** |  | **Countersigning — Assessor’s signature**  **(if applicable)** |  | **Date** |
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I confirm that the candidate’s sampled work meets the standards specified for this unit and may be presented for external verification.

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| **Internal verifier’s name** |  | **Internal verifier’s signature** |  | **Date** |
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| **Countersigning — Internal verifier’s name**  **(if applicable)** |  | **Countersigning — Internal verifier’s signature**  **(if applicable)** |  | **Date** |
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| **External Verifier’s initials and date (if sampled)** |  |

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| **Unit overview** |
| 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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| **Sufficiency of evidence** |
| There must be sufficient evidence to ensure that the candidate can consistently achieve the required standard over a period of time in the workplace or approved realistic working environment. |

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| **Performance criteria** |
| **You must do:** |
| There must be evidence for all Performance Criteria (PC). The assessor **must** assess PCs 1–8 and 10 by directly observing the candidate’s work.  PC 9 may be assessed by alternative methods if observation is not possible. |
| **Agree joint responsibilities in a customer service team**  **1 Identify services or products you are involved in delivering that rely on effective teamwork.**  **2 Identify steps in the handover process that rely on exchange of information between you and your colleagues.**  **3 Agree with colleagues when it is right to pass responsibility for completing a customer service action to another.**  **4 Agree with colleagues how information should be exchanged between you to enable another to complete a customer service action.**  **5 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**  **6 Identify when to check that a customer service action has been completed.**  **7 Ensure that you are aware of all details of customer service actions your colleague was due to complete.**  **8 Ask your colleague about the outcome of completing the customer service action as agreed.**  9 Identify the next customer service actions if your colleagues have been unable to complete the actions you had previously agreed.  **10 Work with colleagues to review the way in which customer service actions are shared.** |

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| **Evidence reference** | **Evidence description** | **Date** | **Performance criteria** | | | | | | | | | |
| **What you must do** | | | | | | | | | |
|
| **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** |
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| **Knowledge and understanding** | | **Evidence reference**  **and date** |
| **What you must know and understand** | |
| For those knowledge statements that relate to **how** the candidate should do something, the assessor may be able to infer that the candidate has the necessary knowledge from observing their performance or checking products of their work. In **all** other cases, evidence of the candidate’s knowledge and understanding must be gathered by alternative methods of assessment (eg oral or written questioning). | |
| 1 | Your organisation's handover procedures for the services or products you are involved in delivering. |  |
| 2 | Your organisation’s handover procedures and how these vary during and between shifts. |  |
| 3 | Your role and responsibilities in the organisation’s handover procedure. |  |
| 4 | The appropriate colleagues to pass responsibility to for completing particular customer service actions. |  |
| 5 | Ways of ensuring that information is passed between you and your colleagues effectively. |  |
| 6 | The importance of checking tactfully with a colleague whether they have completed the customer service actions according to organisational handover procedures. |  |
| 7 | Opportunities for contributing to review the way customer service actions are shared in customer service processes. |  |

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# Supplementary evidence

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| **Evidence** | | **Date** |
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| **Assessor feedback on completion of the unit** |
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