

<b>Unit Title:</b>	<b>Maintain customer service through effective hand over</b>
Unit number	37
Level:	2
Credit value:	4
Guided learning hours:	27
Unit expiry date:	31/12/2014

## Unit purpose and aim

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

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p><b>The Learner will:</b></p> <p>1 Agree joint responsibilities in a customer service team</p>	<p><b>The Learner can:</b></p> <p>1.1 Identify services or products they are involved in delivering that rely on effective teamwork</p> <p>1.2 Identify steps in the customer service delivery process that rely on exchange of information between them and their colleagues</p> <p>1.3 Agree with colleagues when it is right to pass responsibility for completing a customer service action to another</p> <p>1.4 Agree with colleagues on how information should be exchanged between them to enable another to complete a customer service action</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• Their role within a team including: <ul style="list-style-type: none"> <li>- Products/services reliant on teamwork</li> <li>- The importance of exchanging information with colleagues and the methods of communication to use</li> <li>- When to refer responsibility and the procedures to follow</li> </ul> </li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	1.5 Identify ways of reminding themselves when they have passed responsibility to a colleague for completing a customer service action	
2 Check that customer service actions are seen through by working together with colleagues	2.1 Access reminders to identify when to check that a customer service action has been completed 2.2 Ensure that they are aware of all details of customer service actions their colleague was due to complete 2.3 Ask their colleague about the outcome of them completing the customer service action as agreed 2.4 Identify the next customer service actions if their colleagues have been unable to complete the actions they had previously agreed 2.5 Work with colleagues to review the way in which customer service actions are shared	Candidates must be able to: <ul style="list-style-type: none"> <li>• Use reminders to check if a customer action has been completed</li> <li>• Check the details of actions to be completed by others</li> <li>• Identify actions that can be taken if previously agreed actions cannot be completed</li> <li>• Review with others the process of sharing customer service actions</li> </ul>
3 Understand how to maintain customer service through effective handover	3.1 Explain their organisation's customer service procedures for the services or products they are involved in delivering 3.2 Identify the appropriate colleagues to pass responsibility to for completing particular customer service actions 3.3 Describe ways of ensuring that information is passed between them and their colleagues effectively 3.4 Identify ways to remind themselves of actions that need to be checked when they have passed on responsibility to a colleague	Candidates must have an understanding of: <ul style="list-style-type: none"> <li>• Organisational procedures for the delivery of products and/or services</li> <li>• Who to refer customer service actions to</li> <li>• How to ensure that information is passed effectively between themselves and their colleagues</li> <li>• How to remind themselves of actions that require checking and why it is important to check that these have been completed</li> <li>• How to review the sharing of customer service actions</li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	3.5 Explain the importance of checking tactfully with a colleague whether they have completed the customer service actions they were expecting  3.6 Identify opportunities for contributing to review the way customer service actions are shared in customer service processes	

## Assessment

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This unit is centre assessed and externally verified. In order to achieve the unit you must produce a portfolio of evidence which, on request, will need to be made available to the OCR external verifier. Portfolios of work must be produced independently and Centres must confirm to OCR that the evidence is authentic. An OCR Centre Authentication form is provided in the Centre Handbook.

## Evidence requirements

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In order to achieve this unit you must demonstrate that you have met all of the stated learning outcomes and assessment criteria. Your assessor must be able to observe you in the workplace or you must provide tangible evidence of your real work activities.

You may collect evidence for the unit through work in a private sector organisation, a public sector organisation or a not-for-profit organisation.

You must provide evidence that shows you have done this over a sufficient period of time on different occasions for your assessor to be confident that you are competent.

## Guidance on assessment and evidence requirements

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Please refer to the OCR Customer Service Centre Handbook available from the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)

## National Occupational Standards (NOS) mapping/signposting

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This unit maps fully to competences outlined in the Customer Service 2010 (Institute of Customer Service) suite of National Occupational Standards.

## Additional information

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For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)