

Unit Title: Carry out customer service handovers

OCR unit number: 14
 Level: 2
 Credit value: 3
 Guided learning hours: 15
 Unit reference number: T/506/2157

Unit aim and purpose

This unit aims to develop the knowledge and skills required to carry out customer service handovers. Upon completion of this unit, learners will be able to plan and carry out customer service handovers.

Learning Outcomes	Assessment Criteria	Additional Guidance
The Learner will: 1 Understand the customer service handover process	The Learner can: 1.1 Explain an organisation's customer service handover procedures 1.2 Explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues 1.3 Explain why, when and how to set reminders to follow up on actions handed over to others 1.4 Explain levels of their own responsibility in the customer service handover process	Customer service handover is when one member of staff presents the needs of the customer to another member of staff. This could be due to a range of factors, including: <ul style="list-style-type: none"> • Shift change • Escalation
2 Be able to plan customer service handovers	2.1 Identify the steps in the customer service delivery process that rely on exchanges of information among team members 2.2 Agree with colleagues when to pass customer service issues from one person to another 2.3 Agree methods of information exchange	Customer service issues may include: <ul style="list-style-type: none"> • Complaints • Compliments • Linguistic or cultural barriers
3 Be able to carry out customer service handovers	3.1 Explain to customers to whom and why a handover is being made 3.2 Exchange information with colleagues in line with	

Learning Outcomes	Assessment Criteria	Additional Guidance
	organisational procedures 3.3 Check that actions required by others following handovers have been completed 3.4 Identify further actions when the activities required by others have not been completed 3.5 Share feedback with colleagues to make improvements to handover processes	Further actions may include: <ul style="list-style-type: none"> Identifying why the action has not been completed Identifying implications to customer Escalating to line manager or appropriate colleague

Assessment

This unit is internally assessed by centre staff and externally verified by OCR Assessors.

Guidance on assessment

Skills CFA Assessment Strategy Competence units (S/NVQ)

National Occupational Standards (NOS) mapping/signposting

The mapping in the table below provides an indication of where evidence might be available for assessment against some of the knowledge and understanding contained in the national occupational standards (NOS). It does not claim to guarantee that evidence will meet the NOS.

NOS can be viewed on the relevant Sector Skills Council's website or the Occupational standards directory at www.ukstandards.co.uk.

Occupational standards	Unit number	Title
Customer Service (2013) National Occupational Standards:	CFACSB8 CFACSB16	<ul style="list-style-type: none"> Maintain customer service through effective handover Deliver seamless customer service with a team

Additional information

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.