



**ITEC**

## Carry out customer service handovers

VRQ

Learner name:

UBU29

Learner number:

T/506/2157





# Carry out customer service handovers

## UBU29

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The aim of this unit is to develop the knowledge and understanding of the handover process within an organisation. You will learn how to complete handovers of customer's queries, whilst keeping the customer fully informed of the action being taken. You will also learn how to check that the query has been resolved and how to keep the customer updated at all times.

Level

2

Credit value

3

GLH

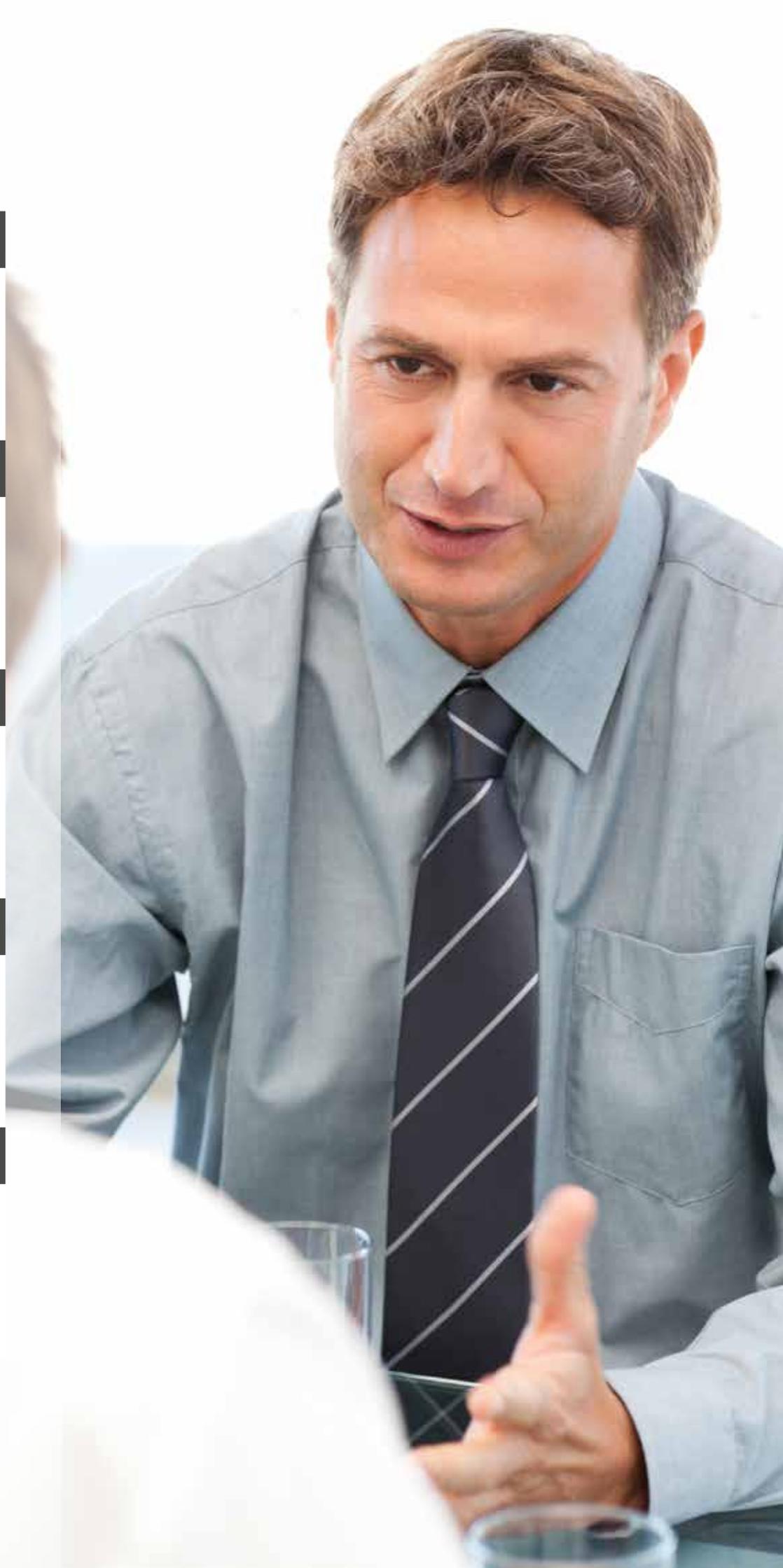
15

Observation(s)

2

External Paper(s)

0



### Learning outcomes

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#### On completion of this unit you will:

1. Be able to plan customer service handovers
2. Be able to carry out customer service handovers
3. Understand the customer service handover process

### Evidence requirements

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#### 1. Environment

Evidence for this unit may be gathered within the workplace or realistic working environment (RWE).

#### 2. Simulation

Simulation is not allowed in this unit.

#### 3. Observation outcomes

Competent performance of Observation outcomes must be demonstrated on **at least two occasions**. Assessor observations, witness testimonies and products of work are likely to be the most appropriate sources of performance evidence.

Professional discussion may be used as supplementary evidence for those criteria that do not naturally occur.

Assessed observations should not be carried out on the same day for the same learning outcome. There should be sufficient time between assessments for reflection and personal development.

You need to meet the same standard on a regular and consistent basis. Separating the assessments by a period of at least two weeks is recommended as competence must be demonstrated on a consistent and regular basis.

#### 4. Knowledge outcomes

There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.

#### 5. Tutor/Assessor guidance

Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on [www.vtct.org.uk](http://www.vtct.org.uk) under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on [www.vtct.org.uk](http://www.vtct.org.uk) under the relevant qualification page.

#### 6. External paper

There is no external paper requirement for this unit.

# Achieving observations

## Achieving observation outcomes

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Your assessor will observe your performance of practical tasks. The minimum number of competent observations required is indicated in the Evidence requirements section of this unit.

Criteria may not always naturally occur during a practical observation. In such instances you will be asked questions to demonstrate your competence in this area. Your assessor will document the criteria that have been achieved through professional discussion and/or oral questioning. This evidence will be recorded by your assessor in written form or by other appropriate means.

Your assessor will sign off a learning outcome when all criteria have been competently achieved.

## Relationship to National Occupational Standards

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Customer Service (2013) National Occupational Standards:

- CFACSB8 Maintain customer service through effective handover
- CFACSB16 Deliver seamless customer service with a team

## Learning outcome 1

### Be able to plan customer service handovers

**You can:**

- a. Identify the steps in the customer service delivery process that rely on exchanges of information among team members\*
- b. Agree with colleagues when to pass customer service issues from one person to another\*
- c. Agree methods of information exchange\*

\*May be assessed by supplementary evidence.

Observation	1	2	Optional
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			

## Learning outcome 2

### Be able to carry out customer service handovers

**You can:**

- a. Explain to customers to whom and why a handover is being made
- b. Exchange information with colleagues in line with organisational procedures
- c. Check that actions required by others following handovers have been completed\*
- d. Identify further actions when the activities required by others have not been completed\*
- e. Share feedback with colleagues to make improvements to handover processes\*

\*May be assessed by supplementary evidence.

Observation	1	2	Optional
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			

# Developing knowledge

## Achieving knowledge outcomes

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You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below\*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

\*This is not an exhaustive list.



## Learning outcome 3

Understand the customer service handover process

You can:	Portfolio reference
a. Explain an organisation's customer service handover procedures	
b. Explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues	
c. Explain why, when and how to set reminders to follow up on actions handed over to others	
d. Explain levels of own responsibility in the customer service handover process	

# Notes

Use this area for notes and diagrams



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VTCT, Aspire House, Annealing Close, Eastleigh,  
Hampshire SO50 9PX United Kingdom

Web:- [www.itecworld.co.uk](http://www.itecworld.co.uk)

Email:- [customersupport@vtct.org.uk](mailto:customersupport@vtct.org.uk)



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