

Customer talk

by Mike Hogan

1. Handing over responsibility

When was the last time you handed over work or responsibilities to a colleague? Answer these questions.

a) What was the subject of the handover?

b) What information did you give to your colleague?

2. A customer handover

Imagine you are handing over a key customer to a colleague. If possible, use a real example from your work situation.

a) Working on your own, complete the table below with information about the customer.

What is the background on this customer?	
What are the customer's priorities?	
What are the opportunities with this customer?	

b) Work with a partner. Brief them on the customer or project you are handing over and answer their questions. Then, change roles: you are briefed by your partner and ask questions. Make notes on what they tell you.

3. Passing on information

- Now, find a new partner and, using your notes, brief them on what your partner in exercise 2 told you.
- Swap partners several times, repeating the exercise until you become confident in passing on the information without using your notes.