Australian Government

AURACA2001 Establish relations with customers

Release 1

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Modification History

Release	Comment
Release 1	Replaces AURC270421A Establish relations with customers Unit code updated to meet policy requirements. Licensing statement added to unit descriptor

Unit Descriptor

Unit descriptor	This unit of competency covers the skills and knowledge required to establish effective relations with customers. Licensing, legislative, regulatory or certification requirements may apply to this unit in some jurisdictions. Users are advised to check with the relevant regulatory authority.

Application of the Unit

Application of the unit	This unit of competency applies to the following and should be contextualised to the qualification to which it is being applied: • retail, service and repair

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the required performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish contact with customer	1.1. A welcoming customer environment is maintained 1.2. Customer is greeted warmly according to enterprise policies and procedures 1.3. An effective service environment is created through verbal and non-verbal presentation according to enterprise policies and procedures
2. Clarify specific needs of a customer	2.1. Customer needs are determined through questioning and active listening 2.2. Customer needs are accurately assessed against the products/services of the enterprise 2.3. Customer details are documented clearly and accurately in required format
3. Provide information and advice	3.1. Features and benefits of products/services provided by the enterprise are described/recommended to meet customer needs 3.2. Information to satisfy customer needs is provided 3.3. Alternative sources of information/advice are discussed with the customer 3.4. Alternatives are followed up
4. Follow up customer needs	4.1. Further information is dispatched to customer 4.2. Gaps in available information are identified and referred to relevant persons for action

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- collect, organise and understand information related to specific needs of customers being identified
- operational skills and techniques in questioning/listening, resolving conflict, following set routines and procedures, handling difficult or abusive customers and greeting/farewelling techniques
- literacy skills in regard to message-taking in person or by telephone and completing written or computer documents of customer details
- plan and organise activities for implementation of a customer service plan
- work with others and in a team by team members with specific skills being sought to meet customer needs
- use mathematical ideas and techniques for customer timeframes being identified and followed
- establish diagnostic processes in which a logical approach to issues is followed
- use workplace technology related to technical skills in operating enterprise telephone systems and other communication equipment

Required knowledge

General knowledge of

- enterprise policies and procedures in regard to:
    - customer service
    - dealing with difficult customers
    - allocated duties/responsibilities
- the range of enterprise merchandise and services, location of telephone extensions and departments/sections
- legislation and statutory requirements, including consumer law, trade practices and fair trading legislation
- industry/workplace codes of practice in relation to customer service

Evidence Guide

EVIDENCE GUIDE	
The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	It is essential that competence is fully observed and there is ability to transfer competence to changing circumstances and to respond to unusual situations in the critical aspects of: • consistently applying enterprise policies and procedures and industry codes of practice in regard to customer service • providing a quality service environment by treating customers in a courteous and professional manner through all stages of the procedure • using effective questioning/active listening and observation skills to identify customer needs • communicating effectively with others involved in or affected by the work.
Context of and specific resources for assessment	• This unit may be assessed in conjunction with other units that form part of the job role or function. • Elements of competence contain both knowledge and practical components. Knowledge components may be assessed off the job. Practical components should be assessed on the job or in a simulated work environment. • Evidence is best gathered using the products, processes and procedures of the individual workplace as the means by which the candidate achieves industry competencies. • The following should be made available: 　• a workplace or simulated workplace 　• documentation, such as enterprise policy and procedure manuals relating to customer service, enterprise telephone directory, legislation and codes of practice 　• a range of customers with different requirements (real or simulated) 　• a communication system or a range of communication equipment 　• enterprise products/services, features and benefits 　• a qualified workplace assessor.
Method of assessment	It is preferable that assessment reflects a process rather than an event and occurs over a period of time to cover varying circumstances. Evidence of performance may be provided by

EVIDENCE GUIDE	
	customers, team leaders/members or other persons, subject to agreed authentication arrangements.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Business types	Enterprise may vary in size, type and location, and in the range of merchandise and services provided and in delivery policies
Customers	Customers may be regular or new and may have routine or special requests. They may include persons from a range of social, cultural or ethnic backgrounds and have physical and intellectual abilities. Regardless, all customers are made feel welcome, valued and, at the end of the process, satisfied. Customer contact may be face-to-face, by telephone or electronic means or in writing
Customer service	Customer service may include: • all enterprise activities, internal and external customers and follow-up in event of delays in service provision
Customer needs	Customer needs may require information regarding: • products or services available, quality of products or services, complementary products or services, enterprise facilities and services, and the location of specific items
Staff	Staff may be full-time, part-time or casual and vary in terms of training, product knowledge and in staffing levels. Staff may be operating in routine or busy trading conditions
Information/documents	Information/documents may include: • enterprise policies and procedures relating to customer service, equipment and product manufacturer/component supplier specifications, enterprise operating procedures, industry/workplace codes of practice and customer requirements

Unit Sector(s)

Unit sector	Sales and Marketing

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Co-requisite units

Not applicable.

Competency field

Competency field	Common