



Australian Government

Department of Education, Employment and Workplace Relations

SIRXEBS001A Acquire and retain online customers

Revision Number: 2

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Modification History

The version details of this endorsed unit are in the table below. The latest information is at the top.

Release	Comments
Second Release	Editorial updates

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required by a retail or wholesale business to enhance customer sales and relationships through adoption of an online strategy.

Application of the Unit

This unit applies to team members who perform market analysis and establish data collection and processing tools to determine current and future online service and sales strategies for maximising sales and service delivery and online customer retention.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Nil

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements and Performance Criteria

Elements	Performance Criteria
<p>Elements describe the essential outcomes of a unit of competency.</p>	<p>Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.</p>
<p>1. Develop an electronic sales strategy.</p>	<p>1.1. Determine online <i>sales strategy</i>. 1.2. Confirm performance indicators for online sales strategy. 1.3. Set online sales budget. 1.4. Establish <i>mechanisms to collate and report</i> online sales data. 1.5. Maximise conversion of <i>customer contact</i> into improved sales through an online sales strategy.</p>
<p>2. Develop an electronic service strategy.</p>	<p>2.1. Establish impact of online service strategy on market share. 2.2. Assess impact of service strategy on <i>suppliers</i>. 2.3. Assess appropriateness of the existing product and service profile and range as part of the online service strategy. 2.4. Determine means to acquire <i>customers</i> online. 2.5. Determine means to improve retention of <i>online customers</i>. 2.6. Establish revenue benefits of an online service strategy. 2.7. Determine means to use <i>information and communication technologies</i> to improve customer satisfaction.</p>
<p>3. Optimise retail web presence.</p>	<p>3.1. Integrate sales and service strategies. 3.2. Confirm customer segments. 3.3. Determine personal preferences and needs of customers within market segment on an ongoing basis. 3.4. Establish pricing rules for online products and services. 3.5. Ensure web presence attracts target customers. 3.6. Construct <i>web presence</i> and systems to permit customer preferences and needs to be determined in an ongoing manner.</p>
<p>4. Build relationships with online customers.</p>	<p>4.1. Analyse customer relationship management systems and models. 4.2. Manage online relationships to retain customers. 4.3. Manage sales and service strategies to reinforce relationships with online customers. 4.4. Collect <i>diagnostic data</i> to support the delivery of services to meet customer behaviours and expectations. 4.5. Share <i>strategic data</i> on customer behaviour with vendors and web designers.</p>

4.6. Optimise loyalty of online customers.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills

- analytical skills to:
 - determine online customer preferences and needs
 - seek out value adding opportunities
 - identify special events and anticipating customer demands
- planning and management skills to:
 - benchmark the positioning of major competitors for online sales and services
 - establish systems to measure the ability of online strategies to meet specific customer requests and preferences
 - implement joint online sales and service plans with business partners
 - develop online sales and service reports
 - provide recommendations for improving online sales and service
- literacy and numeracy skills to:
 - interpret diagnostic and strategic marketing data
 - generate reports

Required knowledge

- customer relationship management systems
- data collection and processing technologies, techniques and tools
- means to share data with suppliers and business partners, according to legal provisions and business policies
- impact of sales and service systems on operational cost efficiencies
- impact of online customer retention and retrieval strategies on revenue
- analysis and reporting requirements for a range of online customer sales and service strategies
- strategies that reinforce online service relationships
- business policy and procedures that can hinder capacity of online systems to meet customer preferences
- relevant privacy, world wide web standards, commercial law and legislation

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 this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- sales and service targets are set according to all factors affecting online markets and product or service delivery
- online market share is determined and maximised through implementation of agreed strategy
- accurate and careful research on the basis for online positioning
- analysis of the impact of web presence on business relationships
- online sales and service strategy designed to maximise customer retention and brand loyalty
- online customers preferences are identified
- establishes data collection and processing tools and techniques that can determine current and future online service and sales strategies.

Context of and specific resources for assessment

Assessment must ensure access to:

- a real or simulated work environment
- relevant documentation, such as:
 - business and marketing plans
 - industry codes of practice
 - information and performance data on existing business model and IT infrastructure
- information on:
 - markets
 - competitors
 - products and services
 - suppliers
 - new technology.

Methods of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- observation of performance in the workplace
- a role play
- a research report
- third-party reports from a supervisor
- customer feedback
- written or verbal questioning to assess knowledge and understanding
- review of portfolios of evidence and third-party workplace reports of on-the-job performance.

Guidance information for assessment

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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.

Sales strategy may vary according to:

- product or service range
- marketing focus
- target market
- duration of campaign
- business policy and procedures in regard to selling products and services
- form of web presence and level of e-commerce readiness
- current and emerging applications and technology
- territory coverage
- industry codes of practice
- market position
- planning cycles and timing
- cost and price analysis.

Mechanisms to collate and report online sales data may include:

- online traffic monitors
- online customer registration
- inventory tracking
- online customer account management.

Customer contact may occur via:

- email
- post
- newsletters
- telephone
- face-to-face.

Arrangements with ***suppliers*** may relate to:

- commercial enterprises
- public agencies or organisations
- governments
- community and not-for-profit organisations
- internal
- delivery of products
- provision of services
- maintenance and support agreements
- leasing agreements and consultancies
- research and development.

Customers may include:

- new or repeat contacts
- internal and external contacts
- customers with routine or special requests
- people from a range of social, cultural and ethnic

backgrounds and with varying physical and mental abilities

Means to retain or acquire *online customers* may include consideration of:

- business customers or individuals
- domestic or international customers.
- retention campaigns and programs
- resource planning
- sales strategies
- pricing strategies
- promotion and distribution strategies
- retention and loyalty programs
- web search and access relationships
- competitor activities
- online customer preferences and buying behaviours.

Information and communication technologies may include:

- personal computers or terminals (stand-alone or networked)
- scanning equipment
- bar coding equipment
- point-of-sale terminals
- hand-held equipment
- software, including:
 - word processing
 - databases
 - spreadsheets
 - financial
 - inventory
- electronic data interchange (EDI).

Web presence may include:

- website
- advertising
- web search and access relationships
- referring links
- email.

Diagnostic data may be:

- qualitative
- quantitative.

Strategic data may include:

- response times
- scalability
- traffic
- security
- customer demographics
- customer confidence
- customer expectations.

Unit Sector(s)

Cross-Sector

Competency field

E-Business