



Australian Government

AURACA3002 Establish customer requirements of a complex nature

Release 1

AURACA3002 Establish customer requirements of a complex nature

Modification History

Release	Comment
Release 1	Replaces AURC362721A Establish customer requirements of a complex nature Unit code updated to meet policy requirements. Licensing statement added to unit descriptor

Unit Descriptor

Unit descriptor	This unit of competency covers the competence to establish customer requirements for sales, parts, administration, finance or services which are more complex. Licensing, legislative, regulatory or certification requirements may apply to this unit in some jurisdictions. Users are advised to check with the relevant regulatory authority.
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Application of the Unit

Application of the unit	
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

Employability skills	This unit contains employability skills.
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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.
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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Confirm customer requirements	1.1. Questioning and active listening techniques are used to clarify customer needs 1.2. Customer requirements are elicited professionally, courteously, with tact and without presumptions 1.3. Customer requirements are fed back accurately and concisely to the customer for confirmation 1.4. Customer requirements are documented accurately in language that can be understood by the customer and by staff 1.5. Customer requirements are documented in accordance with industry, legal and/or enterprise standards and procedures 1.6. Customer acknowledgement and confirmation of the documented requirements are obtained
2. Advise customer of available options	2.1. Viable options to customer needs are generated by the employee 2.2. Viable options that conform to industry, legal and/or enterprise policies and procedures are generated by the employee 2.3. Suppliers are contacted to research options 2.4. Options are explained and discussed with the customer to facilitate customer understanding 2.5. Supporting information is made available to the customer, to facilitate customer understanding 2.6. Benefits and approximate costs of each option are explained to the customer to facilitate informed decision making
3. Inform customer of costs	3.1. Customer is provided with estimated costs and timeframes of selected option 3.2. Costs and timeframes are communicated verbally or in writing, in accordance with enterprise standards and procedures 3.3. Sale or service conditions are explained to customer
4. Agree action plan with customer	4.1. Customer's preferred option, including agreed delivery timeframe, is detailed in action plan 4.2. Agreed action plan is documented 4.3. Customer commitment to agreed action plan is gained, in accordance with enterprise requirements 4.4. Assistance with paperwork requiring completion by customer is provided 4.5. Customer feedback is sought on services provided

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 collating and analysing customer requirements and information
- communication skills in relation to dealing with customers, difficult customers and managing conflict and negotiation
- literacy skills in regard to message taking in person or by telephone and completing written or computer documents of customer requirements and action plans
- plan and organise activities to select and follow processes/procedures to ensure desired outcome
- work with others and in a team by requesting and using information/assistance from colleagues
- use mathematical ideas and techniques to include numerical skills in relation to calculating/modelling various financial and/or insurance arrangements
- establish diagnostic processes which include operational skills and techniques in customer service and problem-solving skills
- use workplace technology related to technical skills in operating enterprise telephone systems and other communication equipment

Required knowledge

Knowledge of:

- industry/enterprise policies and procedures in regard to:
 - customer service
 - customer requirements/needs documentation
 - allocated duties/responsibilities
- the range of enterprise merchandise and services, location of departments/sections and telephone extensions of departments/sections, suppliers, finance and insurance
- legislation and statutory requirements, including workplace health and safety (WHS), 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:

- identifying customer requirements professionally, courteously, with tact and without presumptions
- generating and advising customer of viable options to meet customer needs
- calculating and informing customer of detailed costs and timeframes of agreed option
- proposing and gaining agreement by customer to an action plan to satisfy customer needs.

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 complex requirements (real or simulated)
 - a communication system or a range of communication equipment
 - real or simulated customer documents or database
 - 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 the varying circumstances. Evidence of performance may be provided by customers, team leaders/members or other persons subject to agreed

EVIDENCE GUIDE	
	authentication arrangements.

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, if used 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.

Unit scope	Enterprises may vary in size, type and location, in the range of merchandise and services provided and in delivery policies
Customers	Customers may: <ul style="list-style-type: none"> • be regular or new • have special or unusual requests • be from a range of social, cultural or ethnic backgrounds and with different physical and mental abilities
Staff	Staff may be: <ul style="list-style-type: none"> • full-time, part-time or casual and vary in terms of training, product knowledge and staffing levels • operating in routine or busy trading conditions
Complex customer requirements	Complex customer requirements may include, but are not limited to: <ul style="list-style-type: none"> • unusual or out of the ordinary problems, requirements of special or high importance customers, complex technical problems, matters involving more than one solution or area of service, needs of customers who have not been happy with some aspect of product or service provided or complex financial or insurance arrangements, such as lease, fleet or warranty extension arrangements
Information/documents	Information/documents may include: <ul style="list-style-type: none"> • enterprise policies and procedures relating to customer service, equipment and product manufacturer/component supplier specifications, enterprise operating procedures, legislative and regulatory requirements, 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
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