



**Australian Government**

# **BSBOPS202 Engage with customers**

**Release: 1**

## BSBOPS202 Engage with customers

### Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 7.0.

### Application

This unit describes the skills and knowledge required to participate effectively in customer engagement, including complying with organisational requirements and using a variety of communication methods.

The unit applies to those who perform a range of mainly routine tasks, using limited practical skills and fundamental operational knowledge and who work under some supervision and guidance.

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

### Unit Sector

Business Competence – Business Operations

### Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1. Establish customer demands	1.1 Identify personal targets and key performance indicators (KPIs) for customer engagement according to organisational policy and procedures 1.2 Identify and confirm customer requirements 1.3 Identify options to meet customer expectations according to organisational policies and procedures 1.4 Adapt options to customer requirements according to organisational policies
2. Provide customer service	2.1 Select product or service in consultation with customer 2.2 Explain relevant information and actions to customer and confirm all details

ELEMENT	PERFORMANCE CRITERIA
	<p>2.3 Action customer orders and escalate queries that cannot be immediately satisfied according to organisational policies and procedures</p> <p>2.4 Record details of engagement according to organisational policy</p>
3. Finalise customer engagement	<p>3.1 Supply follow-up information to customer according to organisational policies and procedures</p> <p>3.2 Evaluate compliance with organisational policies and procedures</p> <p>3.3 Seek customer feedback and identify opportunities to enhance service on future engagements</p> <p>3.4 Record and report opportunities for continuous improvement</p>

## Foundation Skills

*This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.*

Skill	Description
Reading	<ul style="list-style-type: none"> <li>Identifies and evaluates a range of texts to determine product information, performance standards and guidelines, and business requirements</li> </ul>
Writing	<ul style="list-style-type: none"> <li>Prepares clear and specific information which conveys an understanding of service requirements, outcomes and alternatives for customers and workplace personnel</li> </ul>
Oral communication	<ul style="list-style-type: none"> <li>Articulates clearly, using industry-specific language suitable to audience to convey requirements and listening and questioning techniques to confirm understanding</li> </ul>
Enterprise and initiative	<ul style="list-style-type: none"> <li>Identifies organisational expectations and follows explicit protocols and procedures, regulations and standards in performance of job role</li> </ul>
Teamwork	<ul style="list-style-type: none"> <li>Follows accepted communication practices and protocols in the provision of customer service</li> <li>Adjusts communication style in response to differences in customer profile, expectations and requirements</li> </ul>
Planning and organising	<ul style="list-style-type: none"> <li>Plans and implements routine customer service tasks and related workload, making limited decisions on sequencing and timing with support as required from relevant personnel</li> <li>Analyses task requirements to decide on appropriate customer service options</li> <li>Identifies difficulties that might present continuous improvement</li> </ul>

Skill	Description
	opportunities
Technology	<ul style="list-style-type: none"><li>Identifies key features of common digital systems and tools and operates them effectively to manage customer communication</li></ul>

## Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBCUE203 Conduct customer engagement
- BSBCUE205 Prepare for work in a customer engagement environment
- BSBCUE302 Deploy customer service field staff
- BSBCUE307 Work effectively in customer engagement.

## Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>