



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **BSBCCO304A Provide sales solutions to customers**

**Release: 1**

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### **Modification History**

### **Unit Descriptor**

This unit describes the performance outcomes, skills and knowledge required to process sales inquiries requiring complex solutions and follow up to ensure customer satisfaction.

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

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### **Application of the Unit**

This unit is applied in any customer contact environment (either inbound or outbound) where sales are an element of the role. Sales may include up sell or cross sell activities, new sales or retention activities such as re contracting or applying loyalty programs.

Competence in this unit requires effective customer service and sales skills, and the provision of the required levels of sales support for customers. It may involve performing credit checks and using systems and technology at varying levels.

This work is undertaken with some supervision and guidance.

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### **Licensing/Regulatory Information**

Refer to Unit Descriptor

### **Pre-Requisites**

### **Employability Skills Information**

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 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.

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## Elements and Performance Criteria

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Element	Performance Criteria
1 Identify customer needs	<p>1.1 Question customers in detail and listen actively to determine <b>product/service requirements</b></p> <p>1.2 Verify and agree customer needs with the customer</p> <p>1.3 Access existing customer records</p> <p>1.4 Offer <b>technical/specialist advice</b> to customer where such advice is considered beneficial to the closing of the <b>sale</b> and customer understanding and decision making</p> <p>1.5 Identify customer's financial limitations</p> <p>1.6 Discuss estimates and quotes with specialist staff if necessary, prior to submission to customer</p> <p>1.7 Prepare, present and discuss estimates/quotes with customer, as the role permits</p> <p>1.8 Explain fully, benefits of the various options</p> <p>1.9 Explain fully, pricing structures to the customer</p> <p>1.1 Give customers the opportunity to question options/quotes provided</p> <p>0</p> <p>1.1 Promote advantages of dealing with the enterprise</p> <p>1</p>

- 1.1 Manage customer objections effectively by  
2 promotion of specific benefits
- 2 Close sales
  - 2.1 Agree on product/service to be purchased with the customer
  - 2.2 Clearly establish customer's preferred **purchase/payment arrangements**
  - 2.3 Accurately finalise documentation relating to sale and forward to customer for agreement and signature
  - 2.4 Negotiate and arrange payment method with customer
  - 2.5 Conduct appropriate **credit checks**
  - 2.6 Clearly record delivery/installation arrangements as agreed with customer
  - 2.7 Comply with **relevant legislation, codes, regulations and standards** during the contact and sale
- 3 Input sales records
  - 3.1 Fully record details of sale
  - 3.2 Amend existing customer records where appropriate
  - 3.3 Initiate invoices in accordance with enterprise policy
  - 3.4 Organise delivery/installation in accordance with enterprise policy
- 4 Provide sales support where required
  - 4.1 Verify customer satisfaction after delivery/installation
  - 4.2 Identify additional action to satisfy customer needs
  - 4.3 Initiate action in an efficient and timely manner

## Required Skills and Knowledge

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

### Required skills

communication skills to effectively communicate with internal and external customers  
communication skills to relate to people from diverse backgrounds and people with diverse abilities  
customer service and sales skills to effectively and efficiently operate within sales environment  
literacy skills to clearly articulate information and advice  
negotiating skills to successfully work through the sales process and difficult contacts or situations  
numeracy skills to accurately analyse and validate data  
organisational skills to manage own tasks within timeframes  
problem-solving skills to apply a range of problem-solving strategies  
self-management skills to consistently evaluate and monitor own performance and to have confidence in own ideas and vision.

### Required knowledge

enterprise pricing policies  
enterprise protocols associated with customer service and sales  
estimate/quote procedures  
marketing principles and practice  
sales principles  
statutory, regulatory and legislative requirements.

## Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, 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

Evidence of the following is essential:

- efficient and effective navigation of systems to locate required information
- accurate use of codes used to locate data
- accurate entering of data onto the system
- checks to ensure data is captured in accordance with established procedures
- identification and analysis of errors and reporting including recommendations
- knowledge of enterprise policies, procedures and guidelines regarding the use and security of information systems.

#### Context of and specific resources for assessment

Assessment must ensure:

- access to relevant standards and guidelines for use of systems
- access to workplace information and data
- access to quality assurance and system user error reports
- access to troubleshooting reports and escalation reports
- access to work environment to observe operation of systems.

#### Method of assessment

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

- direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
- direct observation of use of systems
- review of data entry
- feedback from quality assurance program
- review of performance management reports
- oral and/or written questioning to assess knowledge of systems and organisational

requirements (security and operational).

**Guidance information for assessment**

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

BSBITU101A Operate a personal computer  
ICAU1133B Send and retrieve information over the internet using browsers and email.

## 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.

**Products/service requirements** may include:

different products/services which will meet the customer needs, product model, pricing differentials, product/service types, product/service mixes

**Technical/specialist advice** would:

normally be provided by product/service specialist engineer/provisioning/marketing staff

**Sale** may include:

product/service, purchase/provision, variation to existing product/service, upgrade of current product/service, amendments to previous sale arrangements

**Purchase/payment arrangements** may include:

credit card, cheque, money order, cash, payment on delivery, direct debit

**Credit checks** may be:

automated or undertaken by sales person or by specialist staff within the enterprise

**Relevant legislation, codes, regulations and standards** may include:

Privacy Act  
EEO and Anti Discrimination Legislation  
Telecommunication Act  
Trade Practices Act  
Consumer Credit Code

## **Unit Sector(s)**

empty  
empt

## **Competency field**

Stakeholder Relations - Contact Centre Operations  
Stakeholder Relations - Contact Centre Operations