Australian Government

Department of Education, Employment and Workplace Relations

BSBCCO303A Conduct a telemarketing campaign

Revision Number: 1

INDUSTRY SKILLS COUNCILS
Creating Australia's Future

BSBCCO303A Conduct a telemarketing campaign

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake a telemarketing campaign which may involve both inbound and outbound calling.
	No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit is applied in any customer contact environment with a focus on sales, utilising varying levels of technology.
	Competence in this unit requires preparing, conducting and reviewing the performance of a telemarketing campaign, including managing negative or difficult contacts and completing the sales process.
	Work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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 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.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare for telemarketing campaign	1.1. Study and clarify campaign details and prepare *call*/*contact guides* for *telemarketing campaign*
	1.2. *Learn* the features of the product/service to be marketed
	1.3. Discuss *operational boundaries* and targets with relevant personnel
	1.4. Develop proficiency in the use of relevant *technology*
	1.5. Develop strategies to achieve *sales targets*
	1.6. Identify and develop a clear understanding of fulfilment processes
	1.7. Ensure campaign and call/contact guides meet *relevant legislation*, *codes*, *regulations and standards*
2. Conduct telemarketing campaign	2.1. Make customer contact in the most efficient manner possible
	2.2. Conduct contact in accordance with call/contact guide, enterprise policies and procedures
	2.3. Answer all customer queries with professional responses
	2.4. Explain features and benefits of products to customers, where appropriate
	2.5. Use active listening techniques to create positive customer responses
	2.6. Improvise on call/contact guide content to suit customer needs
	2.7. Identify positive sales responses from customers
	2.8. Develop positive customer responses into sales opportunities
	2.9. Close sales efficiently
	2.10. Escalate customer queries which cannot be satisfied, in accordance with enterprise policy
3. Manage negative customer responses	3.1. Counter *negative customer responses* to the product or organisation with positive features and benefits
	3.2. Respond to personal or irrelevant negative customer responses politely
	3.3. Identify limits of the organisation's tolerance to negatively responding customers
	3.4. Identify when to end a negative customer contact

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ELEMENT	PERFORMANCE CRITERIA
	3.5. Identify negative customer responses which require escalation and escalate appropriately
	3.6. Develop strategies to recover from negative customer responses and to remain positive for next contacts
4. Complete sales	4.1. Record all details of sale accurately and in accordance with procedures
	4.2. Discuss and agree ***payment arrangements*** with customer and action in accordance with enterprise policy
	4.3. Advise customers of payment procedures
	4.4. Record and verify ***credit card details*** with customer, where appropriate and in accordance with organisational protocols
	4.5. Discuss and agree delivery arrangements with the customer and record and action, where applicable
	4.6. Activate the fulfilment processes necessary to complete the sale
	4.7. Apply privacy requirements during the transaction
5. Record campaign results	5.1. Collate and present contact records in accordance with enterprise policy
	5.2. Record and report any difficulties not escalated
	5.3. Analyse performance against agreed targets to identify future improvement
	5.4. Amend any errors in ***databases***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- credit risk evaluation skills to meet organisational credit policy requirements
- customer service skills to deliver professional customer service and sales support
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- interpersonal skills to establish rapport and to build relationships with customers
- literacy skills to communicate and articulate information and advice effectively
- numeracy skills to accurately analyse, calculate and validate data
- sales skills to maximise every contact and sales result
- self-management skills to remain positive and results focused
- stress and time management skills to remain calm when under pressure.

Required knowledge

- enterprise protocols associated with customer service and sales
- legislative and regulatory codes and requirements
- marketing principles and practice
- operational environment - customer base, company products and services
- sales techniques
- fulfilment processes
- technology and systems employed.

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, 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: • meeting of agreed call/sales ratios • achievement of sales targets • accurate application of pre-prepared call/contact guide • management of negative customer contact without disruption to operations • accurate recording of sales, payment and delivery arrangements • successful handling of difficulties incurred during campaign • knowledge of legislative and regulatory codes and requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace information and data (including call/contact guides) • access to performance management, sales performance and quality assurance documentation and records • access to relevant legislation, regulatory requirements, organisational standards and guidelines.
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 • review of performance and sales results • direct observation during sales process including negative customer contacts • oral and/or written questioning to assess knowledge of sales techniques, legislative and regulatory requirements

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EVIDENCE GUIDE	
	• review of quality assurance records • audit of customer and sales records.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO304BProvide sales solutions to customers • BSBCUS301ADeliver and monitor a service to customers • other sales units.

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.	
Call/contact guides may include:	• call closing technique • call flow • features and benefits • greeting etiquette • pricing • product/service features • regulatory, legislative and organisational requirements
Telemarketing campaigns may include:	• customer retention activities such as re-contracting, loyalty and incentive programs and offering value added services • fundraising • product sales • service sales • up sell and cross sell
Learning the features of the product/service may include:	• training
Operational boundaries may include:	• discretion to deviate from the call/contact guide • guidelines and parameters within which the telemarketer can operate • limits of interchange with the customer • mandatory and voluntary requirements • relevant regulatory, legislative and organisational requirements

Technology may:	• be modified for use by people with a disability
	• include:
	  • information systems
	  • sales tracking technology
	  • telecommunications systems

Sales targets may include:	• call volumes • conversion rates • sales made

RANGE STATEMENT	
	• retention rates
Relevant legislation, ***codes***, ***regulations and standards*** may include:	• Consumer Credit Code • Do Not Call Register • equal employment opportunity and anti-discrimination legislation • Freedom of Information • industry specific codes, regulations and legislation • occupational health and safety legislation • Privacy Act • Trade Practices Act
Negative customer responses may include:	• criticising the product or organisation • crude or offensive language • declining further contact • personal insults or threats
Payment arrangements may include:	• cash • cheque • credit card • EFTPOS • money order • payment on delivery
Credit card details may include:	• card holder details • card number • expiry date
Databases may include:	• business directory • enterprise records • sales records • telephone directories

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Stakeholder Relations - Contact Centre Operations

Co-requisite units

Co-requisite units		