



Australian Government

Department of Education, Employment and Workplace Relations

BSBCCO304B Provide sales solutions to customers

Revision Number: 1

BSBCCO304B Provide sales solutions to customers

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	<p>This unit describes the performance outcomes, skills and knowledge required to process sales inquiries requiring complex solutions and follow up to ensure customer satisfaction.</p> <p>No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.</p>
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Application of the Unit

Application of the unit	<p>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.</p> <p>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.</p> <p>This work is undertaken with some supervision and guidance.</p>
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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 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

ELEMENT	PERFORMANCE CRITERIA
1. Identify customer needs	1.1. Question customers in detail and listen actively to determine product/service requirements 1.2. Verify and agree customer needs with the customer 1.3. Access existing customer records 1.4. Offer technical/specialist advice to customer where such advice is considered beneficial to the closing of the sale and customer understanding and decision making 1.5. Identify customer's financial limitations 1.6. Discuss estimates and quotes with specialist staff if necessary, prior to submission to customer 1.7. Prepare, present and discuss estimates/quotes with customer, as the role permits 1.8. Explain fully, benefits of the various options 1.9. Explain fully, pricing structures to the customer 1.10. Give customers the opportunity to question options/quotes provided 1.11. Promote advantages of dealing with the enterprise 1.12. Manage customer objections effectively by 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

ELEMENT	PERFORMANCE CRITERIA
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

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

EVIDENCE GUIDE	
<p>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.</p>	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • Clear and precise understanding of customer needs • Matching of product/service to customer need • Prices relating to product/service offered are clearly explained and understood by the customer • Application of appropriate credit check • Arrangement of customer payment • Agreement with customer as to payment and delivery arrangements • Accurate recording of sales, payment and delivery arrangements
Context of and specific resources for assessment	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> • access to relevant standards, guidelines and/or legislation • access to workplace information and data • access to relevant resources • access to work environment or simulated customer contact centre to observe interaction with customers
Method of assessment	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> • 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 interaction with customers • review record of sale and customer satisfaction • review agreed payment methods and credit checks • oral and/or written questioning to assess knowledge of systems and organisational requirements (security and operational).

EVIDENCE GUIDE**Guidance information for assessment**

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

- BSBCCO301A Use multiple information systems
- BSBCUS301A Deliver and monitor a service to customers

Range Statement

RANGE STATEMENT	
<p>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.</p>	
<p><i>Products/service requirements</i> may include:</p>	<ul style="list-style-type: none"> different products/services which will meet the customer needs, product model, pricing differentials, product/service types, product/service mixes
<p><i>Technical/specialist advice</i> would:</p>	<ul style="list-style-type: none"> normally be provided by product/service specialist engineer/provisioning/marketing staff
<p><i>Sale</i> may include:</p>	<ul style="list-style-type: none"> product/service, purchase/provision, variation to existing product/service, upgrade of current product/service, amendments to previous sale arrangements
<p><i>Purchase/payment arrangements</i> may include:</p>	<ul style="list-style-type: none"> credit card, cheque, money order, cash, payment on delivery, direct debit
<p><i>Credit checks</i> may be:</p>	<ul style="list-style-type: none"> automated or undertaken by sales person or by specialist staff within the enterprise
<p><i>Relevant legislation, codes, regulations and standards may include:</i></p>	<ul style="list-style-type: none"> Privacy Act EEO and Anti Discrimination Legislation Telecommunication Act Trade Practices Act Consumer Credit Code

Unit Sector(s)

Unit sector	
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Competency field

Competency field	Stakeholder Relations - Contact Centre Operations
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Co-requisite units

Co-requisite units		