BSBREL402A Build client relationships and business networks

Revision Number: 1

BSBREL402A Build client relationships and business networks

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish, maintain and improve client relationships, and to actively participate in networks to support attainment of key business outcomes.
	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 applies to individuals in a variety of roles who are required to establish, maintain and improve client relationships to facilitate organisational objectives.
	This unit primarily applies to marketing and sales professionals who depend on excellent interpersonal relationships and communication skills to achieve outcomes, but may also apply to other individuals working in any industry.

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. Initiate interpersonal communication with clients	1.1. Identify and use *preferred client communication styles and methods*
	1.2. Establish rapport with clients using *verbal* and *non-verbal communication* processes
	1.3. Investigate and act upon opportunities to offer positive feedback to clients
	1.4. Use open questions to promote two-way communication
	1.5. Identify and act upon potential *barriers to effective communication* with clients
	1.6. Initiate communication processes which relate to client needs, preferences and expectations
2. Establish client relationship management strategies	2.1. Develop client loyalty objectives focussing on the development of long term business partnerships
	2.2. Assess client profile information to determine approach
	2.3. Develop *client loyalty strategies* to attract and retain clients in accordance with the business strategy
	2.4. Identify and apply *client care and client service standards*
3. Maintain and improve ongoing relationships with clients	3.1. Develop *strategies to obtain ongoing feedback* from clients to monitor satisfaction levels
	3.2. Develop strategies to elicit feedback which provide information in a form that can be used to improve relationships with clients
	3.3. Obtain feedback to develop and implement strategies which maintain and improve relationships with clients
4. Build and maintain networks	4.1. Allocate time to establish and maintain business contacts
	4.2. Participate in *business associations* and/or *professional development activities* to establish and maintain a *network* of support for the business and to enhance personal knowledge of the market
	4.3. Establish communication channels to exchange *information and ideas*
	4.4. Provide, seek and verify information to the network

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- communication skills to determine client needs and preferences through active listening and presenting ideas clearly and precisely
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- interpersonal skills to establish rapport, and to build and maintain relationships with clients.

Required knowledge

- key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects business operations, such as:
  - anti-discrimination legislation
  - consumer laws including appropriate state/territory legislation
  - ethical principles
  - marketing code of practice
  - privacy laws
  - Trade Practices Act
- marketing communications concepts and processes
- principles and techniques for effective communication and networking
- sources of business related networks.

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: • establishing and maintaining relationships with a range of clients related to the candidate's business • participating in and providing, an active contribution to a business related network.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources.
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: • assessment of written reports or journals on client relationship activities • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of the candidate communicating with clients • observation of presentations made to business networks • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other relationship management units • marketing 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.	
Preferred client communication styles and methods may include:	• email • face-to-face • mail • phone
Verbal communication may include:	• articulation • clarity of speech • feedback • language • listening skills • open questions • questioning skills • voice modulation • voice projection
Non-verbal communication may include:	• active listening • body language • body orientation • clothing • colour • distance • facial expression • grooming • gestures • music • posture • sound • touching • voice
Barriers to effective communication may include:	• acting on false assumptions and stereotypes • cultural differences not being addressed • educational differences not being addressed • failure to prominently display contact details in all communications provided to the client

RANGE STATEMENT	
	- inappropriate word choice - ineffective non-verbal communication - lack of 'contact us' forms or pages on websites - lack of distribution of reply paid cards or envelopes in mail outs - lack of voice modulation and articulation - limited opening hours of call centres or office - not listening actively - organisational factors - physical, personal, gender and age differences not being addressed
Client loyalty strategies include:	- access to dedicated staff - added value offers - anniversary offers - client clubs - client reward schemes - credit or discount facilities - dedicated or private facilities - discounts - formal letter of thanks - frequent purchaser programs - handwritten note thanking the client - offering promotional items - phone call thanking client for the business - regular recontact with best clients - thank you gifts and promotions
Client care and client service standards may include:	- accuracy of billing - accuracy of product/service descriptions, specifications in marketing communications - complaint resolution times - incidences of stock outs and back orders - on-hold times - order delivery standards such as: - whether right product or service was delivered - delivered to right person or address - delivered on time - politeness, helpfulness and grooming of delivery staff - delivery vehicles parked properly

RANGE STATEMENT	
	• cleanliness of delivery vehicles • shipment tracking services • telephone answering times and responses
Strategies to obtain ongoing feedback may include:	• including 'comments and queries' or 'bouquets and brickbats' on all order forms • complaints handling procedures • email • letter • soliciting complaints • surveys of current clients • surveys of lapsed clients to determine reason/s for ceasing to buy • telephone interviews • training staff to ask open questions about product or service levels
Business associations may include:	• chambers of commerce • industry associations • institutes • professional bodies • societies
Professional development activities may include:	• demonstrations • exhibitions • fairs • industry information seminars • industry training • pre-launch activities • technical information briefings • trade shows
Networks may include:	• business • formal • groups • individuals • informal • organisations • personal
Information and ideas may include:	• changes in the environment • changing customer requirements • information on competitors' activities • personal, professional or business support

Unit Sector(s)

Unit sector	

Competency field

Competency field	Stakeholder Relations - Relationship Management

Co-requisite units

Co-requisite units		

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