CPPCMN2003A Provide effective client service

Release: 1

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Modification History

Revised unit
Unit updated and equivalent to PRMCMN202A Provide effective client service.

Unit Descriptor

This unit of competency specifies the outcomes required to provide effective client service. It covers establishing client relationships, identifying client needs, and meeting those needs via the delivery of services or by providing information and advice on products and services. The skills and knowledge required will apply to initial or repeat client encounters, either on company or client premises.

Application of the Unit

This unit of competency supports employees without managerial or supervisory responsibilities. The unit may be expected to apply to a worker who has routine contact with internal or external clients and is providing routine, well-defined services and products to clients. It would usually be carried out under routine supervision, within company guidelines.

Licensing/Regulatory Information

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

Pre-Requisites

Not applicable.

Employability Skills Information

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

1	Establish working relationship with client.	1.1	*Client* is greeted courteously according to *company requirements* and *workplace procedures*.
		1.2	Communication during *client contacts* is clear, accurate and courteous according to company requirements.
		1.3	Business relationship is developed by responding to clients in a manner that personalises service and respects cultural diversity.
2	Identify client needs.	2.1	*Client needs* are identified according to workplace procedures and company requirements.
		2.2	Client requests are analysed and where necessary confirmed with client or others to identify exact requirements, according to company requirements.
		2.3	Personal limitations are identified while addressing client needs and assistance is sought from *work group* according to company requirements.
3	Deliver service to client.	3.1	Prompt client service is provided to meet identified needs according to company requirements.
		3.2	*Suggestions and complaints* are treated positively and politely and used to improve personal and company practice according to company requirements.
		3.3	*Opportunities to enhance quality of products, services* and client contacts are identified wherever possible.

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4	Provide effective client service on client premises.	4.1	Workplace procedures are carried out in a timely and professional manner and according to company requirements.
		4.2	Alternative arrangements are negotiated with clients when **commitments** cannot be met, according to workplace procedures and company requirements.
		4.3	Operations and services are provided to satisfy client delivery needs and company requirements.
5	Maintain personal presentation standards and present a professional image.	5.1	Company **uniform** is maintained to present an image consistent with company requirements.
		5.2	Specific presentation requirements are maintained according to company requirements.
		5.3	Visible work area is kept tidy and uncluttered according to company requirements.
6	Promote company's products and services to potential and existing client.	6.1	Products and services of benefit to client are explained clearly and accurately according to company requirements.
		6.2	Sales brochures and product **information** are provided to client according to company requirements.
		6.3	Confidentiality of **product and service information** is maintained according to company requirements.
7	Present positive company image using effective communication techniques.	7.1	Professional ethics are maintained to enhance client commitment and build return client base.
		7.2	Image and good standing are maintained by taking timely action with client according to company requirements.
		7.3	Effective service environment is created through effective **communication techniques**.
		7.4	**Communication equipment** is used effectively and efficiently according to company requirements.

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Required Skills and Knowledge

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

Required skills

- customer service skills to:
    - establish rapport with clients
    - gain client trust
    - interpret and meet client needs
    - listen actively
- interpersonal skills to:
    - negotiate variations in client needs
    - relate to people from diverse backgrounds
- language, literacy and numeracy skills for:
    - acquiring product knowledge
    - communicating clearly and concisely, verbally and in writing
    - providing accurate information on products and services, including pricing
    - questioning with open and closed questions
    - sourcing and using information
    - summarising
- planning and organising skills to manage time
- problem-solving skills to:
    - assess client needs
    - select options to meet client needs

Required knowledge

- client confidentiality provisions
- client groups, both internal and external
- communication equipment procedures, including reporting faults
- company standards and procedures, including:
    - client service standards
    - codes of conduct
    - complaints handling procedures
    - policies and procedures that apply to client services
- legislation, regulations, codes of practice and industry advisory standards that apply to providing client service
- range of options for company products and services
- relevance of client service, good communication and own role in delivering effective client service

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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	This unit of competency could be assessed by observing the provision of a range of effective client services.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	A person who demonstrates competency in this unit must be able to provide evidence of the required skills and knowledge specified in this unit.
	In particular the person should demonstrate the ability to:
	• clarify needs and expectations of clients or explore alternative ways to satisfy their needs and expectations
	• deliver services and responses to client requirements by applying company policy and procedures in a timely and effective manner
	• establish relationships with clients based on the provision of effective client service
	• explain features and benefits of products and services to clients
	• identify client needs through the use of interpersonal skills
	• maintain positive image of self, company and industry by complying with company policies
	• use effective communication techniques to establish rapport with clients.
Context of and specific resources for assessment	Assessment of essential underpinning knowledge may be conducted in an off-site context. It is to comply with relevant regulatory or Australian standards' requirements.
	Resource implications for assessment include access to:
	• assessment documentation forms and record books
	• client service manuals and other relevant organisational documentation
	• products and information used when providing client service
	• suitable work area or a simulated workplace environment that allows for demonstration of identifying client needs and delivering effective client service.
Method of assessment	Assessment methods must:
	• satisfy the endorsed Assessment Guidelines of the Property Services Training Package
	• include direct observation of tasks in real or simulated

	work conditions, with questioning to confirm the ability to consistently identify and correctly interpret the essential underpinning knowledge required for practical application
	• reinforce the integration of employability skills with workplace tasks and job roles
	• confirm that competency is verified and able to be transferred to other circumstances and environments.
	This unit could be assessed on its own or in combination with other units relevant to the job function.
Guidance information for assessment	Reasonable adjustments for people with disabilities must be made to assessment processes where required. This could include access to modified equipment and other physical resources, and the provision of appropriate assessment support.
	Assessment processes and techniques should as far as is practical take into account the language, literacy and numeracy capacity of the candidate in relation to the competency being assessed.

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.

Client may be either internal or external and include:	• people with routine or special requests
	• people from diverse social and cultural backgrounds
	• regular and new clients, including:
	   • business enterprises
	   • government agencies
	   • members of the public
	   • suppliers and manufacturers
	• team members.

Company requirements may include:	• code of ethics
	• company image
	• legal and organisational policies and guidelines
	• legislative and regulatory requirements relevant to work or service function, including:
	   • anti-discrimination and equal employment opportunities
	   • codes of conduct
	   • consumer law
	   • environmental law
	   • harassment and other laws specific to local government
	   • occupational health and safety (OHS)
	   • privacy legislation
	• OHS policies, procedures and programs
	• personnel practices and guidelines outlining work roles, responsibilities and delegations
	• quality systems, standards and guidelines
	• staff appearance and presentation.

Workplace procedures may include:	• assignment instructions • instructions from colleagues, supervisor and manager • personal protective equipment (PPE) requirements • reporting and documentation requirements • specific client requirements.
Client contacts may include:	• answering telephones • face-to-face interactions • interactions with team members.
Client needs may relate	• accuracy of information

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to:	• advice or general information
	• complaints and suggestions
	• purchase of products and services
	• specific requests.
Work groups may include:	• colleagues
	• line managers
	• supervisors.
Suggestions and complaints may include:	• administrative or financial errors
	• damaged goods
	• service or delivery errors.
Opportunities to enhance quality of products and services may include procedures for:	• allocating appointments
	• communicating with clients
	• delivering products and services
	• responding to complaints or suggestions.
Commitments may be:	• individually negotiated
	• negotiated by team approach.
Uniform may include:	• clothes with a company logo or overalls
	• uniform dependent on climate and seasonal changes.
Information may be:	• contained in:
	• company databases
	• manufacturer specifications and information
	• products or services available, including features and benefits
	• provided verbally
	• provided in written material, such as product brochures.
Product and service information may include:	• features and benefits of products and services
	• range of products and services available
	• supplier information.
Communication techniques may include:	• active listening
	• clear and legible writing
	• giving clients full attention
	• maintaining eye contact in face-to-face interactions
	• non-verbal communication, such as:
	• body language
	• personal presentation in face-to-face interactions
	• open and closed questions
	• verbal communication using:
	• clear and concise speech
	• appropriate language and tone of voice.
Communication	• email
	• facsimile

equipment may include:	• internet and intranet applications • paging equipment • photocopiers • telephones.

Unit Sector(s)

Common

Custom Content Section

Not applicable.