Australian Government

Department of Education, Employment and Workplace Relations

CPPDSM4005A Establish and build client-agency relationships

Release: 1

ISC INDUSTRY SKILLS COUNCILS

Creating Australia's Future

CPPDSM4005A Establish and build client-agency relationships

Modification History

Not Applicable

Unit Descriptor

Unit descriptor	This unit of competency specifies the outcomes required to establish, maintain and expand client-agency relationships to support the attainment of key agency business goals. It includes communicating effectively with clients, implementing the agency's approach to client service and client-agency relationship management strategies, implementing personal marketing strategies and building ongoing relationships with clients.
	The unit may form part of the licensing requirements for persons engaged in real estate activities in those States and Territories where these are regulated activities.

Application of the Unit

Application of the unit	This unit of competency supports the work of licensed real estate agents and real estate representatives involved in establishing, maintaining and expanding client-agency relationships to support the attainment of key agency business goals.

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Prerequisite units   Nil

Employability Skills Information

Employability skills   The required outcomes described in this unit of competency contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit of competency is packaged, will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Where *bold italicised* text is used, further information is detailed in the required skills and knowledge and/or 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 Communicate effectively with clients.	1.1 **Enquiries** from **clients** are handled promptly to enable high quality service delivery according to agency practice.
	1.2 **Effective interactive communication strategies** are used to establish **appropriate rapport** and promote two-way communication with clients.
	1.3 Rapport is established with clients and an interest in **client needs**, **preferences and requirements** is expressed to enhance client commitment, trust and credibility of agency and to build return client base.
	1.4 Culturally appropriate styles of communication are used for specific cultural groups.
	1.5 Opportunities to offer positive feedback to clients are identified and acted upon in line with agency practice.
	1.6 **Professional ethics are maintained with client** to promote agency image and credibility.
	1.7 **Potential barriers** to effective communication with clients are identified and addressed.
2 Implement client-agency relationship management strategies.	2.1 Client loyalty objectives are identified to focus on the development of long-term business relationships.
	2.2 **Client profile** information is assessed to determine approach.
	2.3 **Client loyalty strategies** are implemented to attract and retain clients in line with agency practice.
3 Implement agency client care and client service standards.	3.1 Agency **client care and client service standards** are identified and consistently implemented across all areas of agency operations.
	3.2 Customer service problems are identified and adjustments made to ensure continued service quality.
	3.3 Delivery of agency services is coordinated to ensure that service quality is maintained and improved.
4 Implement personal marketing strategies.	4.1 Personal qualities, compliance with ethical and conduct standards, knowledge of property sales and property management environment, customer relations and performance provide a positive role model.
	4.2 **Personal marketing strategies** are identified, evaluated and implemented in line with ethical standards and agency practice.
5 Build ongoing relationships with	5.1 Strategies are implemented for obtaining ongoing **feedback** and **other forms of data** from clients to

ELEMENT	PERFORMANCE CRITERIA
clients.	monitor satisfaction levels.
	5.2 Feedback and other forms of data are collated and analysed to identify options for improving relationships with clients.
	5.3 Feedback and other forms of data are used to develop and implement ways of maintaining and improving relationships with clients.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills:

- ability to communicate with and relate to a range of people from diverse social, economic and cultural backgrounds and with varying physical and mental abilities
- analytical skills to interpret feedback from clients
- application of risk management strategies associated with implementation of client care and client service standards
- client service skills to determine client needs; enhance client commitment, trust and credibility of agency; and build return client base
- computing skills to access agency databases, send and receive emails and complete standard forms online
- decision making and problem solving skills to analyse situations and make decisions aimed at improving client service
- literacy skills to access and interpret a variety of texts, including customer feedback; prepare general information and papers; prepare formal and informal letters; prepare reports and applications; and complete standard and statutory forms
- planning, organising and scheduling skills to collect, collate and process client feedback
- research skills to identify and locate documents and information relating to client care and client service standards.

Required knowledge and understanding:

- barriers to effective communication
- client-agency relationship management strategies
- client care and client service standards
- client loyalty strategies
- communication process, strategies and techniques

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REQUIRED SKILLS AND KNOWLEDGE

- ethical standards
- personal marketing strategies
- relevant federal, and state or territory legislation and local government regulations relating to:
  - anti-discrimination and equal employment opportunity
  - consumer protection, fair trading and trade practices
  - employment and industrial relations
  - environmental issues
  - financial services
  - industrial relations
  - leases and tenancy agreements
  - OHS
  - privacy
  - property sales and management
  - taxation
- risks and risk management strategies.

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, the range statement and the Assessment Guidelines for this Training Package.

Overview of assessment	This unit of competency could be assessed through practical demonstration of establishing, maintaining and expanding client-agency relationships to support the attainment of key agency business goals. Targeted written (including alternative formats where necessary) or verbal questioning to assess the candidate's underpinning knowledge would provide additional supporting evidence of competence. The demonstration and questioning would include collecting evidence of the candidate's knowledge and application of ethical standards and relevant federal, and state or territory legislation and regulations. This assessment may be carried out in a simulated or workplace environment.
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: • building ongoing relationships with clients • communicating effectively with clients

- implementing agency approach to client service
- implementing client-agency relationship management strategies
- implementing personal marketing strategies
- knowledge of agency practice, ethical standards and legislative requirements relating to maintaining and building client-agency relationships
- knowledge of customer loyalty strategies.

Context of and specific resources for assessment

Resource implications for assessment include:

- access to suitable simulated or real opportunities and resources to demonstrate competence
- assessment instruments that may include personal planner and assessment record book
- access to a registered provider of assessment services.

Where applicable, physical resources should include equipment modified for people with disabilities.

Access must be provided to appropriate learning and/or assessment support when required.

Assessment processes and techniques must be culturally appropriate, and appropriate to the language and literacy capacity of the candidate and the work being performed.

Validity and sufficiency of evidence require that:

- competency will need to be demonstrated over a period of time reflecting the scope of the role and the practical requirements of the workplace
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the person's competence
- all assessment that is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through simulated project-based activity and must include evidence relating to each of the elements in this unit.

In all cases where practical assessment is used it will be

combined with targeted questioning to assess the underpinning knowledge. Questioning will be undertaken in such a manner as is appropriate to the language and literacy levels of the candidate and any cultural issues that may affect responses to the questions, and will reflect the requirements of the competency and the work being performed.

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 in the performance criteria is detailed below. Add any 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.

Enquiries:	• may be received through:
	• email
	• facsimile
	• inspections
	• office
	• open houses
	• referrals
	• telephone
	• website
	• may refer to:
	• agency services
	• property development
	• property investment
	• property management
	• property sales.
Clients may include:	• body corporate managers
	• buyer's agents
	• buyers
	• owners
	• people from a range of social, cultural or ethnic backgrounds and with varying physical and mental abilities
	• property developers
	• regular and new customers
	• sellers
	• tenant's agent
	• tenants.
Effective interactive communication strategies may include:	• active listening
	• being non-judgemental
	• exploring problems
	• expressing an individual perspective

	• providing sufficient time for questions and responses
	• reflective responses in conflict situations
	• using appropriate words, behaviour and posture
	• using clarifying and summarising questions
	• using clear and concise language
	• using culturally appropriate communication
	• using plain English
	• using verbal and non-verbal communication.
Appropriate rapport relates to use of techniques that:	• establish and build confidence and trust in the agency and its representatives
	• make the buyer feel valued
	• promote and maintain an effective relationship with the buyer.
Client needs, *preferences and requirements* may relate to:	• property development
	• property investment
	• property management
	• property sales.
Professional ethics maintained with client may include:	• confidentiality
	• honesty
	• positive statements
	• privacy.
Potential barriers may include:	• cultural differences
	• educational differences
	• non-verbal communication
	• not listening actively
	• organisational factors
	• physical, personal and age differences
	• stereotypes
	• voice modulation and articulation
	• word choice.
Client profile may include:	• expectations of agency
	• personal characteristics, including:
	• age
	• gender
	• sex
	• social and economic background
	• property development intentions
	• property investment intentions
	• property management intentions
	• property sales intentions.
Client loyalty strategies	• costs

may refer to:	- meeting legal and ethical requirements
	- specific activities, including:
	- client reward schemes
	- cross-selling
	- formal letters of thanks
	- handwritten notes thanking clients
	- online
	- phone calls thanking clients for business
	- promotional items
	- up-selling
	- service
	- success measures
	- targets
	- timeframes
	- value for money.
Client care and client service standards may include:	- access to professional advice
	- agency staff expertise
	- client follow-up
	- client satisfaction
	- communication
	- confidentiality
	- conflict resolution
	- cross-cultural communication
	- knowledge of property and property markets
	- problem solving
	- quality of advice
	- quality of service
	- time for responding to client enquiries.
Personal marketing strategies may include:	- building profile in local community
	- business and professional networks
	- customer service
	- ethics
	- media
	- participation in community and service organisations
	- personal promotional materials, including:
	- print, such as business cards, flyers and brochures
	- web, such as website, web log and podcast
	- personal property knowledge
	- personal knowledge of property sales, property management, property development and property investment

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	• personal skill development
	• professional presentation
	• target markets
	• visibility in local community.
Feedback may be obtained through:	• discussions
	• email
	• focus groups
	• interviews
	• letters
	• market research
	• survey instruments
	• telephone calls
	• website.
Other forms of data may include:	• property management statistics
	• property sales statistics.

Unit Sector(s)

| **Unit sector** | Property development, sales and management |

Competency field

| **Competency field** | Real estate |

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