



Australian Government

Department of Education, Employment and Workplace Relations

CSCORG406A Manage activities to meet client requirements

Revision Number: 2

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Modification History

CSCORG406A Release 2: Layout adjusted. No changes to content.

CSCORG406A Release 1: Primary release.

Unit Descriptor

This unit of competency describes the outcomes required to manage work activities to meet client requirements and contracts. It covers negotiating all aspects of client expectations, delivering quality services to clients, planning activities to provide products and service and managing the products, resources and work environment to ensure mutual satisfaction and continuous improvement.

Application of the Unit

This unit applies to candidates with both general and specialist competencies from a range of occupational areas.

In practice, managing activities to meet client requirements overlaps with other generalist or specialist work activities, such as using workplace communication strategies, gathering and analysing information, using resources, etc.

Licensing/Regulatory Information

Not applicable.

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 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.

Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

ELEMENT**PERFORMANCE CRITERIA****1 Negotiate client requirements.**

- 1.1 Contribute to honest and confidential discussion of *client* interests.
- 1.2 Provide clear and accurate information about the features and benefits of products and services to clients.
- 1.3 Ensure agreements contain all relevant information needed to determine the work activities necessary to meet client requirements.
- 1.4 Ensure *agreements and contracts* comply with legal and organisational requirements.
- 1.5 Record, store and use information provided by and to clients according to legal and organisational requirements.
- 1.6 Review client agreements regularly to determine improvements that can be made.

2 Plan activities.

- 2.1 *Consult relevant people* about the activities needed to meet client requirements.
- 2.2 Monitor *activity plans* for circumstances that might affect activities, such as past experience and available resources.
- 2.3 Ensure activity plans allow client requirements to be met in the time agreed and meet the *organisation's policies and procedures*.
- 2.4 Develop additional resources, team practices and skills to meet client requirements.

3 Maintain the work environment.

- 3.1 Advise all relevant people about their legal and organisational responsibilities to maintain a healthy, safe and productive *work environment*.
- 3.2 Allocate resources and support to ensure that people involved can work in a healthy, safe and productive environment.
- 3.3 Review and improve the work environment through the involvement of team members.
- 3.4 Ensure that the work environment meets all legal and organisational requirements and is as productive as possible within work constraints.
- 3.5 Respond to breaches in health and safety promptly and in line with policies and *legal requirements*.
- 3.6 Make clear and prompt recommendations for improving the work environment.
- 3.7 Accurately complete all records of health and safety to meet organisational requirements.

ELEMENT**PERFORMANCE CRITERIA****4 Monitor products and services.**

- 4.1 Consult relevant people about all aspects of the quality of products and services and acknowledge their advice on improvements to the processes involved.
- 4.2 Review products and services according to quality management practices to ensure compliance with contract plans.
- 4.3 Obtain feedback from clients on how effectively their requirements are being met.
- 4.4 Consult clients on a regular basis regarding their short and long-term needs for products and services and when there are significant changes to products and services.
- 4.5 Review contracted prices and conditions according to changing demands, supplies and technology.
- 4.6 Take prompt action when products, services and processes fail to meet requirements.
- 4.7 Complete records of customer agreements and outcomes accurately according to organisational policies.
- 4.8 Implement and review procedures during the manufacturing or service supply process to ensure that best practices and operator safety are maintained.

Required Skills and Knowledge

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

Required skills:

- applying legislation, regulations and organisational policies, procedures and practices relating to meeting client requirements
- using effective communication techniques especially related to negotiation, contracts, formal agreements and team collaboration and cooperation
- using a range of reliable sources of information
- promoting and responding to feedback
- maintaining accurate and comprehensive records and reporting to key people
- applying procedures relating to occupational health and safety, equal employment opportunity, equity and diversity in the context of client service
- designing activity plans that are realistic, manageable, mutually agreed to and contain all the components necessary for implementation and measurement
- managing resources efficiently, safely and cost-effectively
- applying quality assurance mechanisms and processes
- applying continuous improvement methods
- developing resources based on activity plans
- developing systems for product and service review and redesign.

Required knowledge:

- legislation, regulations, policies and procedures relating to the protocols and guidelines that determine activities that meet client requirements
- principles of quality assurance and continuous improvement
- requirements for dealing with internal and external customers and maintaining a customer focus
- strategies for planning and monitoring activities
- product and services related to the focus of the work environment
- consultation methods and principles of team participation
- principles of time and resource management
- organisation's environmental and sustainability practices.

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 should be assessed in the workplace and assessment should include the opportunity to demonstrate evidence from work in the wider community. Evidence should be gathered over time in a range of contexts to ensure the candidate can achieve the unit outcome and apply the competency in different situations or environments.

Evidence will be required of performance in a range of variables required by the work site and the defined work role and responsibilities.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of employability skills as they relate to this unit
- ability to manage activities to meet client requirements in a range of (two or more) contexts or occasions, over time.

Context of and specific resources for assessment

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when managing activities to meet client requirements, including coping with difficulties, irregularities and breakdowns in routine
- copies of legislation, policies, procedures and guidelines relating to client service delivery
- access to appropriate learning and assessment support when required.

Method of assessment

Evidence must include observation and information generated in the workplace as well as observation of performance in routine work functions or, where this is not possible, in a simulated exercise.

The following assessment methods are suggested:

- observation of performance in routine workplace activities within a range of agreed responsibilities and in various work locations

- written and/or oral questioning to assess knowledge and understanding
- completion of workplace documents and reports produced as part of routine work activities
- third-party reports from experienced practitioners
- completion of performance feedback from supervisors and colleagues
- case studies
- scenarios
- simulations or role plays.

Guidance information for assessment

Assessment methods should reflect workplace demands, and any identified special needs of the candidate, including language and literacy implications and cultural factors that may affect responses to the questions.

In all cases where practical assessment is used it will be combined with targeted questioning to assess the underpinning knowledge.

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.

Clients may include:

- individual members of the public
- individual members of the organisation
- other work areas in the organisation
- external agencies in the justice system
- other agencies and community groups
- service funding bodies targeting offender needs
- senior management
- government and Ministers.

Agreements and contracts must comply with:

- organisational quality standards
- product and service quality standards
- existing and available resources
- realistic and achievable contract conditions
- transparent communication, reporting and recording
- customer and service focus
- sound financial management
- competitive tendering systems.

Consult relevant people, including:

- consultants
- management
- team members
- operational staff
- product and service experts.

Activity plans should include:

- organisational quality standards
- product and service quality standards
- existing and available resources
- realistic and achievable contract conditions
- transparent communication, reporting and recording
- customer and service focus
- sound financial management
- competitive tendering systems
- effective use of time and resources
- probity and duty of care.

Organisation's policies and procedures may include:

- consultation with relevant people
- financial and commercial viability
- allocation of resources

- Work environment** should include:
- occupational health and safety
 - recording and reporting
 - security
 - risk assessment
 - probity and duty of care.
 - effective resource use and maintenance
 - probity and duty of care
 - occupational health and safety policies and procedures
 - non-discriminatory and accountable employment delegations and work practices
 - clearly defined policies, guidelines and agreed practices
 - accurate and clear information and reporting systems
 - physical site and locations
 - indoor and outdoor facilities
 - equipment
 - materials
 - working procedures.
- Legal requirements** relate to:
- different forms of contracts and commercial agreements and compliance requirements
 - recording contracts and agreements
 - information management
 - duty of care
 - ethical practice and probity
 - competitive tendering.

Unit Sector(s)

Organisational administration and management.

Competency field

Not applicable.