



Australian Government

Department of Education, Employment and Workplace Relations

PRMCMN202A Provide effective client service

Release: 1

PRMCMN202A Provide effective client service

Modification History

Not Applicable

Unit Descriptor

Unit descriptor

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

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/products to clients. This unit would usually be carried out under routine supervision, within company guidelines.

Application of the Unit

Not Applicable

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Not Applicable

Elements and Performance Criteria Pre-Content

Not Applicable

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Establish a working relationship with clients	1.1 Acknowledge and greet <i>clients</i> courteously in accordance with <i>company requirements</i> and <i>workplace procedures</i> 1.2 Communicate with <i>clients</i> in a clear, accurate and courteous manner during <i>contacts</i> in accordance with <i>company requirements</i> 1.3 Establish rapport/relationship with <i>client</i> and express a genuine interest in <i>client</i> needs/requirements in accordance with <i>company requirements</i>
2 Identify client needs	2.1 Identify <i>client needs</i> in accordance with <i>workplace procedures</i> and <i>company requirements</i> 2.2 Analyse <i>client</i> requests and where necessary confirm, with the <i>client</i> or others, to identify exact requirements in accordance with <i>company requirements</i> 2.3 Provide <i>clients</i> with <i>information</i> about available options for meeting their needs in accordance with <i>company requirements</i> 2.4 Identify any personal limitations in addressing <i>client needs</i> and, where appropriate, seek assistance from others in the <i>work group</i> in accordance with <i>company requirements</i>
3 Deliver service to clients	3.1 Provide prompt <i>client</i> service to meet identified needs in accordance with <i>company requirements</i> 3.2 Treat <i>suggestions and complaints</i> positively and politely and, where appropriate, use to improve personal and company practice in accordance with <i>company requirements</i> 3.3 Identify <i>opportunities to enhance the quality of products and services</i> and <i>client contacts</i> and utilise such opportunities wherever possible
4 Provide effective client service on client premises	4.1 Carry out <i>workplace procedures</i> in a timely and professional manner in accordance with <i>company requirements</i> 4.2 Negotiate alternative arrangements with <i>clients</i> where previously arranged <i>commitments</i> cannot be met, in accordance with <i>workplace procedures</i> and <i>company requirements</i> 4.3 Ensure operations and services provided

ELEMENT	PERFORMANCE CRITERIA
	satisfy <i>client</i> delivery needs and <i>company requirements</i>
5 Maintain personal presentation standards and present a professional image	5.1 Maintain company <i>uniform</i> to present an image appropriate to work functions carried out in accordance with <i>company requirements</i> 5.2 Maintain specific presentation requirements in accordance with <i>company requirements</i> 5.3 Keep visible work area tidy and uncluttered in accordance with <i>company requirements</i>
6 Promote the products and services of the organisation to potential and existing clients	6.1 Explain <i>products and services</i> of benefit to the <i>client</i> clearly and accurately in accordance with <i>company requirements</i> 6.2 Provide sales brochures and product <i>information</i> to <i>clients</i> where available and appropriate in accordance with <i>company requirements</i> 6.3 Maintain confidentiality of <i>product and service information</i> in accordance with <i>company requirements</i>
7 Present a positive company image using effective communication techniques	7.1 Maintain professional ethics to enhance client commitment and to build a return <i>client</i> base 7.2 Maintain the image and good standing by taking timely actions with <i>clients</i> in accordance with <i>company requirements</i> 7.3 Create an effective service environment through appropriate effective <i>communication techniques</i> 7.4 Use <i>communication equipment</i> effectively and efficiently according to <i>company requirements</i>

Required Skills and Knowledge

Refer to Evidence Guide

Evidence Guide

EVIDENCE GUIDE

Critical aspects of competency

- Accurate identification of client needs through the use of appropriate interpersonal skills.
- Deliver services and respond to client requirements by applying company policy and procedures in a timely and accurate manner.
- Ability to clarify the needs and expectations of the client or explore alternative ways of satisfying their needs and expectations.
- Detailed knowledge of products and services and the capacity to explain to clients the features and benefits of products and services.
- Use effective communication techniques to enable rapport with clients to be established.
- Use appropriate presentation techniques and follow company uniform policies in order to maintain a positive company/industry and self-image.
- Establish a relationship with clients that engenders integrity and trust that will allow for the provision of effective client service to follow.

Knowledge needed to achieve the performance criteria

Knowledge and understanding are essential to apply this unit in the workplace, to transfer the skills to other contexts and to deal with unplanned events. The knowledge requirements for this unit are listed below.

- The range of possibilities of company products/services.
- Company client service standards.
- Importance of client service, good communication and an individual's role in delivering client service.
- Client confidentiality provisions.
- Client groups - internal and external.
- Complaints handling procedures.
- Effective communication techniques including summarising and clarifying.
- Communication equipment procedures including reporting faults.
- Company codes of conduct.
- Uniform policies and procedures.

Specific skills needed to achieve the performance criteria

To achieve the performance criteria, some complementary skills are required. These relate to the ability to:

- use communication skills that assist in identifying and meeting client needs including:
 - locating and using information
 - time management
- use analytical skills to interpret and meet client needs
- use flexibility to handle variations in client needs
- use problem-solving skills
- use language skills that allow for adequate communication with the client
- use literacy skills to the level required to acquire the required product knowledge
- use numeracy skills to the level required to interpret the client requirements and meet their needs
- relate to people from a range of social, cultural and ethnic backgrounds.

Other units of competency that could be assessed with this unit

Where practical, this unit should be assessed in an integrated fashion with other appropriate units.

This unit could be assessed on its own or in combination with other competencies relevant to the job function.

Resources required to assess this unit

Practical assessment will frequently be in the workplace or a suitable similar environment. Access to such an environment will be required. The candidate and the assessor should have access to the appropriate documentation and resources normally utilised in the workplace. This includes access to the following:

- a suitable work area or a simulated workplace environment that allows for demonstration of identifying client needs and delivering effective client service
- products and information utilised in the provision of client service
- client service manuals and other relevant organisational documentation
- assessment documentation forms and record books.

Gaining evidence to assess this unit

For valid and reliable assessment of this unit, the competency should be demonstrated over a period of time and be observed by the assessor (or assessment team working together to conduct the assessment). The competency is to be demonstrated in a range of situations that may include client/workplace interruptions and involvement in related activities normally experienced in the workplace.

This unit is essentially skills-based and it is expected that assessment will be largely practical (i.e. workplace-based or by simulation) in nature, supported by questioning to assess product knowledge.

Performance and assessment of this unit must be carried out within the relevant requirements of the legislative and industry framework and as set out in company OHS policies and procedures. Assessment requires that client inquiries meet the objectives of the company and industry expectations in the particular company requirement.

Key competency levels

There are a number of processes learnt throughout work and daily life that are required in all jobs. They are fundamental processes and generally transferable to other work environments. Some of these work processes are covered by the key competencies listed below. Information provided to each question highlights how these processes are applied in this unit of competency.

The number in brackets indicates the level to which the key competency should be demonstrated.

- | | | |
|------------------------------|---|---|
| 1 Perform the process | 2 Perform and administer the process | 3 Perform, administer and design the process |
|------------------------------|---|---|

How can information be collected, analysed and organised (2) ?	Interpret and analyse client needs against available company products and services.
How can communication of ideas and information (2) be applied?	Identify the client needs and recommend acceptable alternatives to the client.
How are activities planned and organised (2) ?	Organise work tasks and rescheduling according to client requirements.
How can teamwork (1) be applied?	Share experiences with difficult clients and discuss possible solutions.
How can the use of mathematical ideas and techniques (1) be applied?	Calculate product and service pricing.
How can problem-solving skills (2) be applied?	Develop acceptable solutions and deliver that service to standard and in an appropriate timeframe. Identify where client requirements can and cannot be met and suggest alternatives.
How can the use of technology (2) be applied?	Store and retrieve client and product information and effectively utilise electronic communication equipment in line with company requirements.

Range Statement

RANGE STATEMENT

The range statement links the required knowledge and organisational and technical requirements to the workplace context. It describes any contextual variables that will be used or encountered when applying the competency in work situations. It allows for different work practices and work and knowledge requirements as well as for differences between organisations and workplaces. The following variables may be present for this particular unit.

Clients may be either internal or external and include:

- clients with routine or special requests
- people from a range of social, cultural or ethnic backgrounds
- people with varying physical and mental abilities
- regular and new clients including but not limited to:
 - members of the public
 - business enterprises
 - government agencies
 - suppliers

- team members.

Communication equipment may include:

- email
- facsimile
- Internet/Intranet applications
- paging equipment
- photocopiers
- telephones.

Company requirements may include:

- code of ethics
- company image
- dress/uniform codes
- legal and company policy/guidelines
- legislation relevant to the work or service function
- legislative and regulatory requirements including:
 - codes of conduct
 - consumer law
 - discrimination/equal employment opportunity
 - environmental law
 - harassment and other laws specific to local government, state and federal legislation
 - 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.

Client contacts may include:

- answering the telephone
- face-to-face interactions
- interactions with team members.

Client needs may relate to:

- accuracy of information
- advice or general information
- making complaints/suggestions
- purchasing products and services
- specific requests.

Commitments may be:

- individually negotiated
- negotiated in a team approach.

Communication techniques may include:

- active listening techniques
- clear, legible writing
- giving clients full attention

- maintaining eye contact (for face-to-face interactions)
- non-verbal communication e.g. body language, personal presentation (for face-to-face interactions)
- speaking clearly and concisely
- using appropriate language and tone of voice
- using open and/or closed questions
- verbal or written responses.

Information may be:

- contained in manufacturers' specifications or information
- provided verbally
- written e.g. product brochures.

Opportunities to enhance the quality of products and services may include procedures for:

- allocating appointments
- communicating with clients
- delivering products and services
- responding to complaints or suggestions.

Product and service information may include:

- features and benefits of products/services
- range of products/services available
- supplier information.

Suggestions and complaints may include:

- administrative or financial errors
- damaged goods
- service or delivery errors.

Uniform may include clothes with a company logo or overalls. Requirements for uniform type may depend on climate and seasonal changes.

Work groups may include:

- colleagues
- line managers
- supervisors.

Workplace procedures may include:

- assignment instructions
- instructions from colleagues/supervisor/manager
- personal protective equipment requirements
- reporting and documentation requirements
- specific client requirements.
-

Unit Sector(s)

Not Applicable