Australian Government

Department of Education, Employment and Workplace Relations

SIRWSLS302 Process product and service data

Release: 1

INDUSTRY
SKILLS
COUNCILS
Creating Australia's Future

SIRWSLS302 Process product and service data

Modification History

The version details of this endorsed unit are in the table below. The latest information is at the top.

Release	Comments
First Release	This is a revised unit, based on and equivalent to SIRWSLS004A Process product and service data.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to maintain and process business-to-business sales, customer service and related product data using the existing business technology and systems.

This requires the use of business technology and systems to maintain an accurate product database to evaluate and forecast customer preferences and product or service performance, according to business policy and procedures.

Application of the Unit

This unit applies to sales and administrative staff.

Licensing/Regulatory Information

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

Pre-Requisites

Nil

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements and Performance Criteria

Element	Performance Criteria
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.
1. Source and process product and service data.	1.1. Source and report *product and service data* using *business technology and systems*.
	1.2. Store, retrieve and relay *data*, according to business technology, information management systems and procedures.
	1.3. Process product and service data, according to confidentiality, security and systems access requirements.
2. Monitor customer sales.	2.1. Monitor product mix for each *customer* to identify potential add-on sales.
	2.2. Monitor customer sales figures to identify success of current *sales and supply targets*.
	2.3. Enter information affecting future forecasts into the database in an accurate and timely manner.
	2.4. Use *new technologies* to gather data from the field to expedite the sales and provide real time feedback to customers.
3. Maintain product database.	3.1. Maintain accurate and current details of products and services in *product database*, including deleting old items and inserting new items.
	3.2. Collect and correctly process latest data.
	3.3. Apply security procedures for access to database.
	3.4. Build and maintain data records, according to *business policy and procedures*.
	3.5. Collect information for reporting purposes using appropriate technology to convey product or service information.
	3.6. Generate *reports* in line with business requirements.
4. Determine customer preferences.	4.1. Evaluate volume of products purchased by individual customers to anticipate future requirements and preferences.
	4.2. Provide timely and accurate reports on information that can enhance decision making on provision of products and services to customers.

Required Skills and Knowledge

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

Required skills

- literacy and numeracy skills to:
    - analyse and evaluate information
    - interpret sales data
    - produce reports
    - read and interpret a range of written material initiative and enterprise skills to apply security procedures for business technology and systems
- planning and organising skills to collect and organise information
- time management skills to generate reports in a timely manner
- technology skills to use business technology and systems to:
    - generate reports to business requirements
    - input and process product and service data
    - maintain product databases
    - monitor customer preferences and sales and develop sales and supply targets
    - retrieve and use data appropriately
    - use business technology systems during security procedures

Required knowledge

- business policy and procedures in regard to:
    - data security and privacy
    - evaluation of product and service performance
    - reporting mechanisms
    - supply and distribution of products or services
    - use and maintenance of customer and sales data
- data processing requirements
- factors determining customer preferences
- work health and safety (WHS) with relation to use of computer equipment
- range of customers, and product and services offered
- storage and security of data and hardware or records systems
- types of data
- procedures for the use and maintenance of business technology and systems

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.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • uses business technology and systems to perform accurate data processing, storage and retrieval, according to data and systems security requirements and business policy and procedures • collects and organises information to maintain accurate and current details of products and services in database • uses database to perform accurate product or service performance evaluations and report accurate information on customer preferences across a range of customers and products or services, according to business policy and procedures • interprets customer preference and product or service performance information to forecast customer preferences and requirements.

Context of and specific resources for assessment	Assessment must ensure access to:
	• a business-to-business sales work environment
	• relevant sources of product and service information
	• relevant documentation, such as:
	  • policy and procedures manuals
	  • sales reports
	  • business plans and objectives
	• relevant business technology and systems.

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: • observation of performance in the workplace • third-party reports from a supervisor • review of portfolio of evidence • written or verbal questioning to assess knowledge and understanding.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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 individual, accessibility of the item, and local industry and regional contexts) may also be included.

Product and service data may include:	• evaluation documentation • financial statements • invoices and payment requests • offer and contract documents • purchase requests and orders • records of conversation • records of supplier performance • statements and petty cash vouchers • tender submissions and proposals.

Business technology and systems may include:	• electronic data interchange (EDI)
	• information management systems
	• numerical keyboard equipment, including calculators
	• personal computers or terminals (stand-alone or networked)
	• point-of-sale terminals
	• portable data entry
	• printers
	• sales and distribution systems
	• scanners
	• software, including:
	  • word processing
	  • databases
	  • spreadsheets
	  • financial
	  • inventory.

Data may be:	• annual reports • electronic and hard copy • internal or external • public • secure • statistical reports • verbal.
Customers may include:	• business customers • customers with routine or special requests • internal and external contacts

	• new or repeat contacts
	• people from a range of social, cultural and ethnic backgrounds
	• people with varying physical and mental abilities.
Sales and supply targets may include:	• customer retention
	• market share
	• positioning with local businesses
	• presentation or merchandising of products or services
	• price
	• quality
	• shift in sales demographics
	• volume of sales.
New technologies may be used for a range of sales purposes, including:	• real time:
	• checking stock arrival times
	• checking stock levels
	• processing orders
	• sales presentation
	• scheduling visits and service calls
	• web-product demonstrations.
Details recorded in *product database* may include:	• dimensions and characteristics
	• manufacturer or supplier
	• packaging
	• seasonal variations
	• special events
	• trends
	• wholesale and retail prices.
Business policy and procedures may relate to:	• data security and privacy
	• evaluation of product and service performance
	• operation and maintenance of business technology reporting mechanisms
	• supply and distribution of products or services
	• use and maintenance of customer and sales data.
Reports may be:	• annual reports
	• electronic or hard copy
	• internal or external
	• statistical reports
	• verbal or written.

Unit Sector(s)

Wholesale

Competency Field

Sales