



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **SIRXSL004A Build relationships with customers**

**Revision Number: 1**

## **SIRXSL004A Build relationships with customers**

### **Modification History**

Not applicable.

### **Unit Descriptor**

<b>Unit descriptor</b>	This unit describes the performance outcomes, skills and knowledge required to use advanced sales techniques in building relationships with customers and interacting with customers, applying expert product knowledge as it relates to customers, dealing with difficult customers, establishing and maintaining a customer database, and conducting sales presentations.
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### **Application of the Unit**

<b>Application of the unit</b>	This unit applies to senior sales personnel. It requires the development and maintenance of expert knowledge to provide accurate product information to customers, including post-sales support; and communication, analysis and sales techniques to plan and implement sales presentations, build positive relationships with customers, and resolve customer complaints.
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### **Licensing/Regulatory Information**

Not applicable.

### **Pre-Requisites**

<b>Prerequisite units</b>	Nil
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## Employability Skills Information

**Employability skills** The required outcomes described in this unit contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit 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.

## Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Establish rapport with customers.	<ul style="list-style-type: none"><li>1.1 Establish rapport and relationship with <b><i>customer</i></b> and express a genuine interest in <b><i>customer needs and requirements</i></b> to enhance customer commitment, trust and credibility of store and to build return customer base.</li><li>1.2 Maintain <b><i>professional ethics</i></b> with the customer to promote store image and credibility.</li><li>1.3 Accurately clarify <b><i>customer needs and preferences</i></b> to maximise sales opportunities.</li><li>1.4 Maximise sales opportunities by use of add-on and complementary <b><i>sales techniques</i></b>.</li><li>1.5 Give customer space and time to evaluate purchase decision, while using time to maximum advantage for customer and store.</li></ul>

ELEMENT	PERFORMANCE CRITERIA
	1.6 Use effective methods to close sales.
2 Apply expert knowledge.	<p>2.1 Provide customer with accurate information regarding product and service appraisals, correct statements and warranties according to <b><i>legislative requirements</i></b>.</p> <p>2.2 Provide detailed knowledge of supplier or manufacturer information according to customer needs and commercial confidentiality guidelines.</p> <p>2.3 Evaluate product range, accurately demonstrate features and benefits of products or services where appropriate and make recommendations to the customer to maximise sales potential.</p> <p>2.4 Maximise customer interest in product or service through price negotiation where applicable and offer payment and credit options according to <b><i>store policy</i></b>.</p> <p>2.5 Accurately calculate prices and discounts according to pricing determinants and store policy.</p>
3 Provide post sales support.	<p>3.1 Accurately provide evidence of ongoing support as sale is concluded.</p> <p>3.2 Accurately explain <b><i>back-up service</i></b> and reassure customer according to legislative requirements and store policy.</p> <p>3.3 Provide customer with store or salesperson's contact details to provide line of contact and customer followed up according to store policy.</p> <p>3.4 Accurately enter customer and transaction details into <b><i>customer database</i></b>.</p>
4 Plan sales presentations.	<p>4.1 Plan presentation to complement <b><i>product characteristics</i></b>.</p> <p>4.2 Select client group according to product characteristics and store merchandising policy.</p> <p>4.3 Access <b><i>promotional materials</i></b> where required and distribute to client group.</p> <p>4.4 Select and prepare a range of products or services for presentation to reflect store image, demographics and merchandising plan.</p>

ELEMENT	PERFORMANCE CRITERIA
5 Implement sales presentation.	<ul style="list-style-type: none"><li>5.1 Ensure sufficient numbers of adequately briefed support staff, where required for a presentation.</li><li>5.2 Apply communication skills to effectively create interest, focus attention, and encourage customer interaction with individuals or groups.</li><li>5.3 Demonstrate products or services to create a buying environment.</li><li>5.4 Measure results of sales presentation according to predetermined criteria, review overall performance and results, and apply information to enhance future <i>sales presentations</i> according to store sales policy.</li></ul>
6 Maintain and utilise a customer database.	<ul style="list-style-type: none"><li>6.1 Maintain customer confidentiality as required by store policy and legislative requirements.</li><li>6.2 Develop and maintain accurate <i>customer records</i> and store securely according to store policy and procedures.</li><li>6.3 Accurately identify and follow up regular customers according to store marketing policy.</li><li>6.4 Accurately utilise customer records to advise customers on products and services of possible interest.</li><li>6.5 Implement <i>customer loyalty schemes</i> where required according to store promotional activities.</li></ul>
7 Deal with difficult customers.	<ul style="list-style-type: none"><li>7.1 Acknowledge customer complaints and problems and reassuringly support <i>difficult customers</i> to produce positive outcome.</li><li>7.2 Use questioning and active listening to encourage customer to verbalise issue and minimise customer frustration.</li><li>7.3 Develop customer's confidence in the candidate and product or service to promote long-term trust and commitment to store.</li><li>7.4 Establish mutually acceptable resolution of complaint.</li></ul>

## Required Skills and Knowledge

### REQUIRED SKILLS AND KNOWLEDGE

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

The following skills must be assessed as part of this unit:

- selling techniques, including:
  - opening and closing techniques
  - identifying buying signals
  - strategies to focus customer on specific merchandise
  - add-ons and complementary sales
  - overcoming customer objections
- presentation skills
- conflict resolution
- verbal and non-verbal interpersonal communication
- accessing relevant product information
- literacy and numeracy skills in regard to:
  - reading and understanding product information
  - reading and understanding store policies and procedures
  - recording client and sales information
  - calculating prices and discounts.

The following knowledge must be assessed as part of this unit:

- store policies and procedures, in regard to:
  - establishing, maintaining and utilising customer records
  - updating and maintaining customer mailing lists
  - methods of maintaining customer confidentiality and secure storage of customer details
  - pricing, including GST requirements
  - price negotiation and payment and credit options
  - resolving customer complaints
- store and area merchandise and service range
- relevant legislation and statutory requirements
- relevant industry codes of practice
- OHS requirements such as:
  - manual handling
  - plant and equipment

## REQUIRED SKILLS AND KNOWLEDGE

- hazardous substances and dangerous goods
- workers compensation
- customer types and needs, including:
  - customer buying motives, customer behaviour and cues
  - individual and cultural differences, demographics, lifestyle and income
  - types of customer needs, e.g. functional, psychological.

## 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.

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

Evidence of the following is essential:

- consistently applies store policies and procedures in regard to selling products and services, dealing with customers, planning and implementing sales presentations and providing after sales support
- consistently applies industry codes of practice, relevant legislation and statutory requirements in regard to selling products and services
- consistently develops customer commitment to store and builds return customer base by establishing rapport and relationship with customer, maintaining professional ethics, and accurately discerning customer buying motives and customer needs and requirements
- consistently maximises sales opportunities by using effective selling techniques, applying detailed product knowledge and using an appropriate sales approach to sell the benefits of products, overcome objections and close sales
- consistently and accurately applies detailed knowledge of manufacturer and supplier supply, back-up service and warranty information to enhance customer support
- consistently uses effective questioning, listening

## EVIDENCE GUIDE

and observation skills to accurately determine customer requirements

- consistently and effectively plans, prepares and conducts sales presentations and briefs support staff where required, to create a buying environment and maximise sales performance
- consistently evaluates personal and or team sales performance to maximise future sales
- consistently and accurately establishes, records and maintains customer records and details, maintains customer confidentiality, ensures secure storage of data and uses customer records to maximise customer interest and create a buying atmosphere
- consistently resolves customer complaints by acknowledging problems and supporting customer to produce positive outcomes and obtain mutually acceptable complaint resolution.

### Context of and specific resources for assessment

Assessment must ensure access to:

- a retail work environment
- relevant sources of product information
- relevant documentation, such as:
  - policy and procedures manuals
  - industry codes of practice and relevant legislation
  - OHS legislation and codes of practice
- a range of customers with different requirements
- an appropriate range of products and equipment
- a customer database system.

## EVIDENCE GUIDE

### Methods 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 the candidate in the workplace
- third-party reports from a supervisor
- customer feedback
- written or verbal questioning to assess knowledge and understanding
- review of portfolios of evidence and third-party workplace reports of on-the-job performance.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

### Assessing employability skills

Employability skills are integral to effective performance in the workplace and are broadly consistent across industry sectors. How these skills are applied varies between occupations and qualifications due to the different work functions and contexts.

Employability skills embedded in this unit should be assessed holistically in the context of the job role and with other relevant units that make up the skill set or qualification.

## 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.

## RANGE STATEMENT

*Customers* may include:

- new or repeat contacts
- external and internal contacts
- customers with routine or special requests
- people from a range of social, cultural and ethnic backgrounds and with varying physical and mental abilities
- a single customer, couples, families or groups.

*Customer needs and requirements* may be clarified through:

- observation
- appropriate questioning
- active listening
- empathy
- reassurance and confirmation.

Maintaining *professional ethics* with the customer may include:

- honesty
- positive statements
- confirmed appraisals of products and services.

*Customer needs and preferences* may include:

- product type
- brand
- size
- product characteristics
- customer physical needs
- price.

*Sales techniques* will include:

- add-on and complementary products and services
- selling up or down
- suggestive selling
- variety of methods of closing sales.

## RANGE STATEMENT

***Legislative requirements*** may include:

- Trade Practices and Fair Trading Acts
- environmental protection legislation
- OHS
- transport, storage and handling of goods
- pricing procedures, including GST requirements
- privacy laws
- liquor laws
- tobacco laws
- sale of second-hand goods
- health and welfare law specific to local government, state and federal legislation.

***Store policy*** and procedures in regard to:

- selling products and services
- maintaining and utilising client records
- promotional, marketing, discounting and reward programs
- dealing with difficult customers
- resolving customer complaints.

***Back-up service*** may include:

- delivery specifications
- warranties and guarantees
- returns policies
- technical support
- installation
- financial products and services.

***Customer database*** may be:

- manual
- computer-based.

***Product characteristics*** may include:

- features and benefits
- price range
- supplier or manufacturer information
- target group.

## RANGE STATEMENT

*Promotional materials* may include:

- brochures
- pamphlets
- posters
- promotional merchandise
- business cards
- vouchers.

*Sales presentations* may be:

- in-house
- at client site
- visual
- verbal.

*Customer records* may include:

- name and contact details
- transaction records
- personal preferences
- anniversaries and special dates
- details of items bought or returned.

*Customer loyalty schemes* may include:

- customer clubs
- customer reward schemes
- credit or discount facilities
- special offers.

*Difficult customers* may include:

- aggressive
- assertive
- passive
- fussy
- demanding
- rude
- exasperated
- arrogant.

## Unit Sector(s)

**Sector**

Cross-Sector

## **Competency field**

**Competency field**

Sales